ODA Portfolio Monitoring Tool - PMT

User Manual

Version 2
August 2007

Table of content

I. Introduction 3

Why Microsoft Access? 3

What does PMT do? 3

II. Project Profile 4

Access to PMT 4

PMT Homepage 4

Interface 4
PMT functions 5

View Project data 6

Portfolio Data 7
Find, Sort and Filter 8
View Project Profile 9

III. Aggregating and Analysis functions 12

Queries 12

What is query? 12
Moving column 14
Hiding and unhiding columns 14
Changing the font 15
Changing the gridline or background colour 15
Filtering records 15
Sorting Columns 16
Freezing or unfreezing columns 16
Exporting a query to Excel or Word 17

Reports 18

To access and view reports 18
Page set-up 19
To print reports 20
To export report to MS Excel or MS Word 21

Charts 21

To access and display charts 21
To copy charts to other Office documents 24

Assess Project Performance 25

Access to assessment function 25
Add new assessment 26
Assess project(s) 26

IV. Upload to PMT 29

AMT management and conditions ***29***

Conditions for AMT upload 29
To manage AMT files by quarter 29

To upload data from AMT to PMT ***30***

To upload data 30
FAQ 31

To export and import data from PMT to PMT ***31***

To export data from PMT 32
To import data to PMT 33

V. PMT Set up **34**

To set up linkage to database ***34***

To set up the PMT ***36***

To add or edit users ***37***

To access user setup 37
To add a new user 37
To edit an existing user 38

To add or edit donors ***40***

To access donor setup 40
To add a new donor 41
To edit or delete an existing donor 41

Pick lists ***42***

To access pick lists 42
To change a pick list 44

Report parameters ***44***

Contacts ***45***

Chapter

1

I. Introduction

PMT is a monitoring tool designed to support Project Owners (PO) and Line Agencies (LA) to monitor their ODA portfolio.

Why Microsoft Access?

Microsoft Access is chosen for the fact that:

- It is a corresponding database system which can formulate a good environment for data management, perform complicated queries, make reports and coordinate with other Microsoft products;
- It can be easily upgraded to a bigger database system, such as Microsoft SQL Server, if required; and
- PMT versions can operate on Microsoft Access 2000, 2002, 2003 and XP.

What does PMT do?

PMT enables PO and LA to:

- Monitor current status of their ODA programs/projects;
- Review progress and performance effectiveness of an individual project as well as the whole portfolio;
- Make pre-formatted reports;
- Save soft copy of project reports;
- Automatically update information from quarterly progress monitoring reports prepared by PMUs using AMT; and
- Exchange information with other PMTs by exporting or importing information of portfolio, using XML-based data files.

Chapter

2

II. Project Profile

Access to PMT

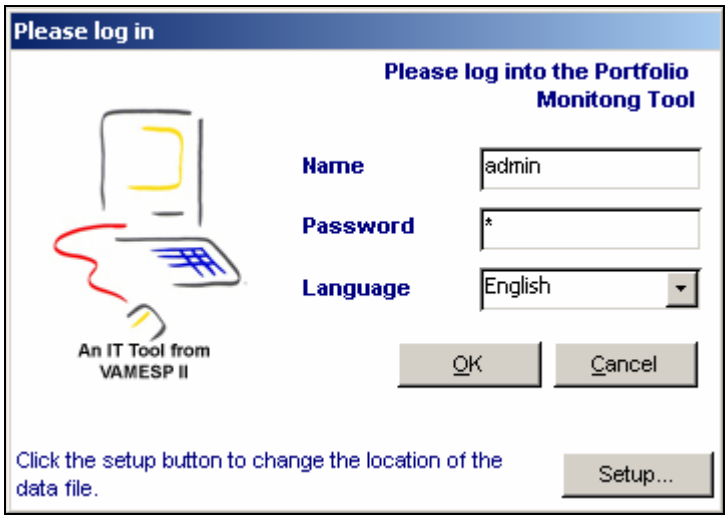
1 Double click on the PMT icon

2 Type the username and password

3 Choose an appropriate language

4 Click **OK** to access the system

Note: Please contact PMT administrator if you do not have the username and password



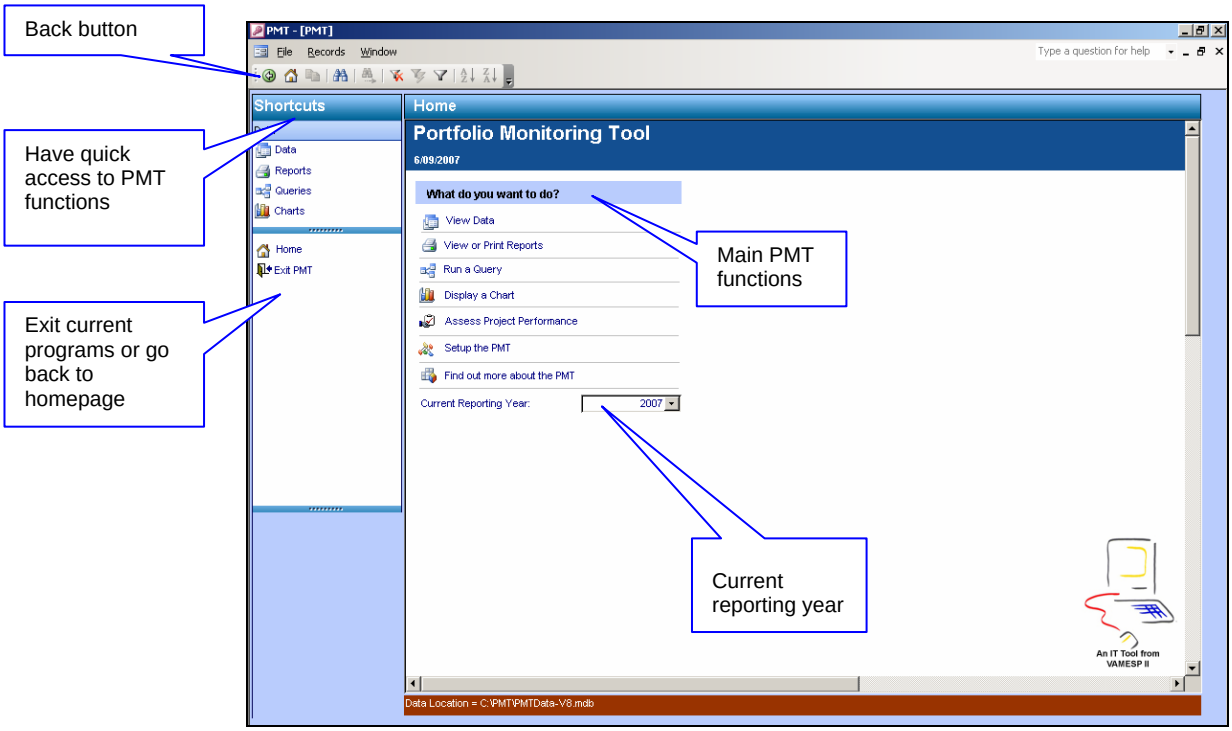
PMT Homepage

Interface

PMT Home is the starting point of all actions. From here you can:

- Have quick access to PMT functions;

- Exit current programs or go back to homepage;
- Access the main PMT window displayed in the middle of screen.



PMT functions

PMT functions which can be accessed from the homepage are:

1 View project data

How to view project data is shown in Chapter 2

2 View or Print reports

How to view and print reports is shown in Chapter 3

3 Run queries

How to view and work with queries is shown in Chapter 3

4 Display charts

How to display and work with charts is shown in Chapter 3

5 Assess Project Performance

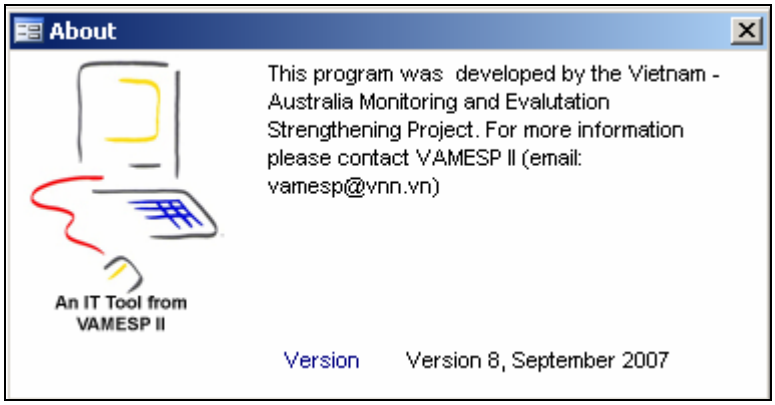
How to access project performance is shown in Chapter 3

6 Set up PMT

How to set up PMT is shown in Chapter 5

7 Find out more about the PMT

The link to window showing PMT version and contact address in case of technical assistance is shown below:


About
This program was developed by the Vietnam - Australia Monitoring and Evalutation Strengthening Project. For more information please contact VAMESP II (email: vamesp@vnn.vn)
An IT Tool from VAMESP II
Version
Version 8, September 2007

8 View the current reporting year

Users can change the current reporting year so viewing data and reporting become more convenient. The current reporting year, by default, is the current system year.

9 Import data from AMT (Available on File menu) (Excel)

How to input data from AMT(Excel) is shown in Chapter 5

10 Import and export data from PMT (Available on File menu)

How to import and export data from PMT is shown in Chapter 5

11 Exit PMT

By double clicking on **Exit PMT** in left or button in the top right of screen.

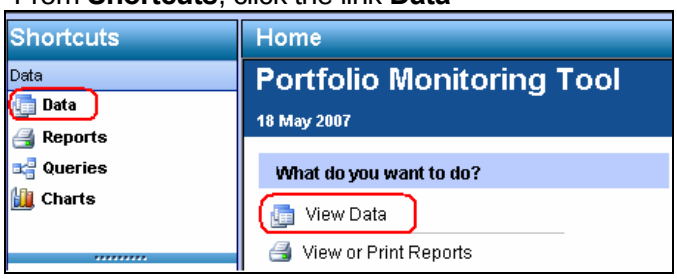
View Project data

With AMT providing quarterly progress monitoring information as input to the system, PMT functions to display and analyse these data in order to display and analyse the project achievement, actual implementation progress against its plan, and benchmark the whole portfolio. Therefore, ideally, PMT users can only display and aggregate information instead of modify the data input.

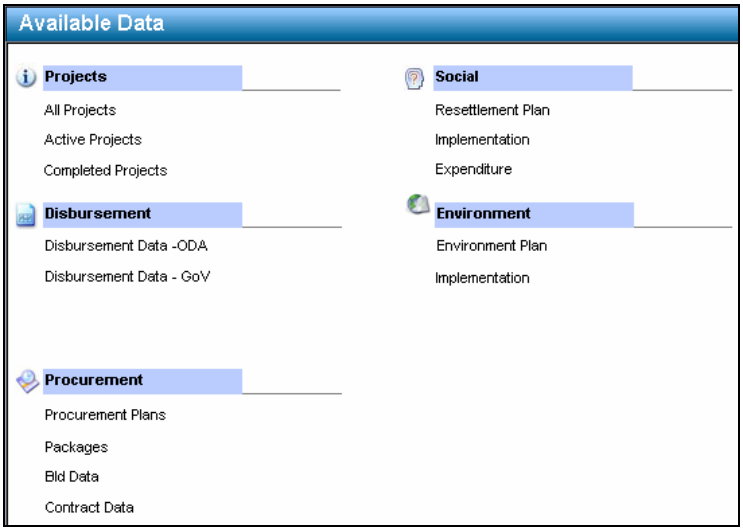
Portfolio Data

1 There are two ways to view portfolio data:

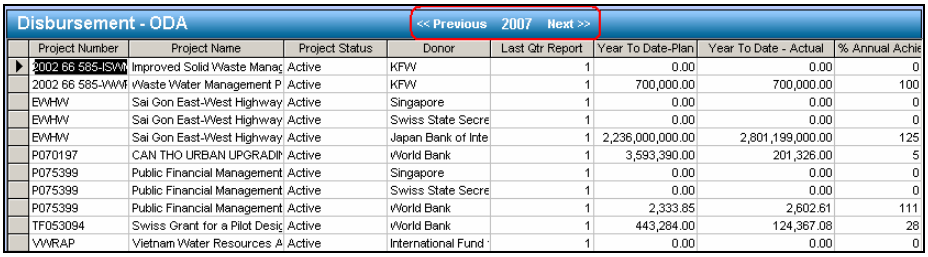
- From **Homepage**, click the link: **View data** or alternatively
- From **Shortcuts**, click the link **Data**



2 The main window of Data will be displayed containing links to Projects, Disbursement, Procurement, Social and Environment. Upon necessity, you can click on the desired link.



3 When accessed, data will be displayed in column showing data of all projects in portfolio. The information in each column is different in relevance to content. The example of **Disbursement Data – ODA** is shown below:



Project Number	Project Name	Project Status	Donor	Last Qtr Report	Year To Date-Plan	Year To Date - Actual	% Annual Achie
2002 66 585-ISWM	Improved Solid Waste Manag	Active	KFW	1	0.00	0.00	0
2002 66 585-VWM	Waste Water Management P	Active	KFW	1	700,000.00	700,000.00	100
EWHW	Sai Gon East-West Highway	Active	Singapore	1	0.00	0.00	0
EWHW	Sai Gon East-West Highway	Active	Swiss State Secre	1	0.00	0.00	0
EWHW	Sai Gon East-West Highway	Active	Japan Bank of Inte	1	2,236,000,000.00	2,801,199,000.00	125
P070197	CAN THO URBAN UPGRADIN	Active	World Bank	1	3,593,390.00	201,326.00	5
P075399	Public Financial Management	Active	Singapore	1	0.00	0.00	0
P075399	Public Financial Management	Active	Swiss State Secre	1	0.00	0.00	0
P075399	Public Financial Management	Active	World Bank	1	2,333.85	2,602.61	111
TF053094	Swiss Grant for a Pilot Desig	Active	World Bank	1	443,284.00	124,367.08	28
VWRAP	Vietnam Water Resources A	Active	International Fund	1	0.00	0.00	0

4 Like the example of **Disbursement Data – ODA**, many contents will be displayed by year for all projects having reports in corresponding years. You can check the data in previous or following reporting year by clicking the link **Previous** or **Next** located at the top of the window

5 To exit this window, you can go back to **Homepage** by clicking on the Back button on the toolbar or use **Shortcut** to access other functions of the PMT.

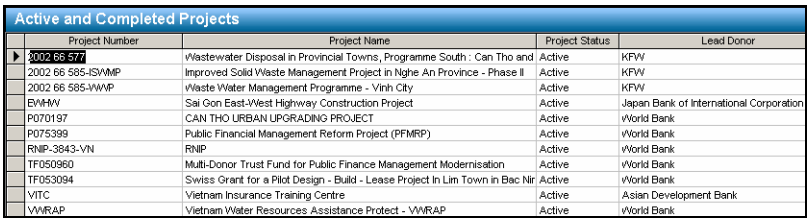
Find, Sort and Filter

When information is displayed so much that it is hard to find some specific detail, you can use the search button or sort button and in toolbar.

Find

The below example shows how to find a project through a part of project name, for instance, you are looking for a project with name consisting of "water".

1 Access to Data – All projects as instructed above



Active and Completed Projects

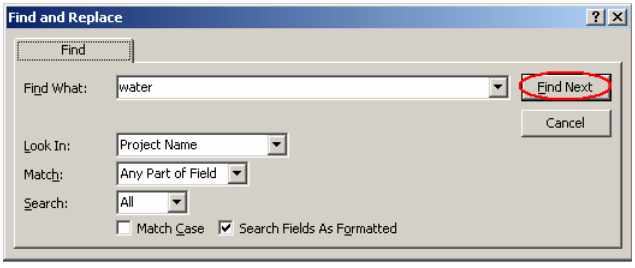
Project Number	Project Name	Project Status	Lead Donor
2002 66 577	Wastewater Disposal in Provincial Towns, Programme South : Can Tho and	Active	KFW
2002 66 585-ISWMP	Improved Solid Waste Management Project in Nghe An Province - Phase II	Active	KFW
2002 66 585-WWP	Waste Water Management Programme - Vinh City	Active	KFW
BWHW	Sai Gon East-West Highway Construction Project	Active	Japan Bank of International Corporation
P070197	CAN THO URBAN UPGRADING PROJECT	Active	World Bank
P075399	Public Financial Management Reform Project (PFMRP)	Active	World Bank
RNIP-3843-VN	RNIP	Active	World Bank
TF050960	Multi-Donor Trust Fund for Public Finance Management Modernisation	Active	World Bank
TF053094	Swiss Grant for a Pilot Design - Build - Lease Project In Lim Town in Bac Nir	Active	World Bank
VITC	Vietnam Insurance Training Centre	Active	Asian Development Bank
VWRAP	Vietnam Water Resources Assistance Protect - VWRAP	Active	World Bank

2 Click on the column header to blacken the column **Project name**

3 Click the search button in toolbar to open search window.

4 In the filed **Find What**, enter "water"

5 In **Match field**, select **"Any Part of Field"**



6 Click the button **Find Next** and PMT will look for the first project with 'water" in its name.

7 Click the button **Find Next** again to find more projects matching the searching criteria

Sort

You can use the button for ascending and descending sorting for any column in portfolio.

1 Click to blacken the column you want to sort

2 Click the button of ascending sort or descending sort in toolbar

3 The selected column is now sorted as desired.

Filter

The example below shows how to do a simple filtering; for instance, you are trying to filter project(s) whose name contains "upgrading"

1 Select and blacken the word "upgrading" in the project name column

2 Click the button to filter

3 This returns list of project(s) whose name contains "upgrading"

4 Click the button to remove filter

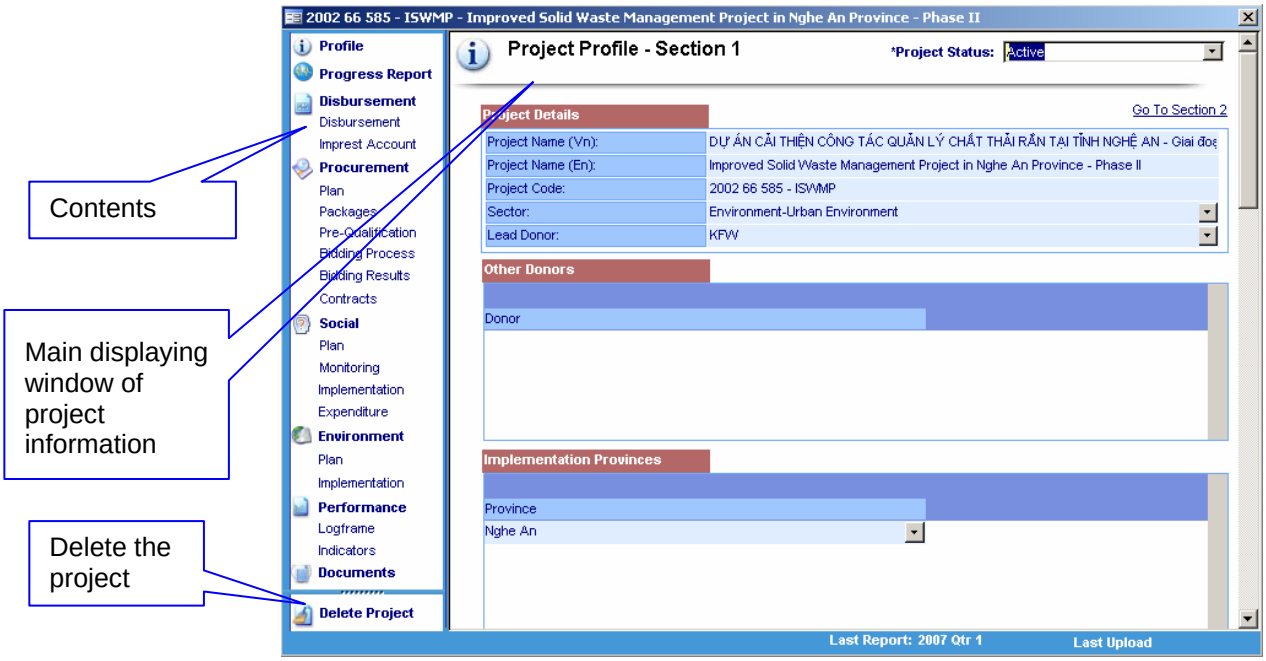
View Project Profile

1 Access to Data - All projects as instructed above

2 Click on the row header to blacken the project in interest

3 Double click on the row header

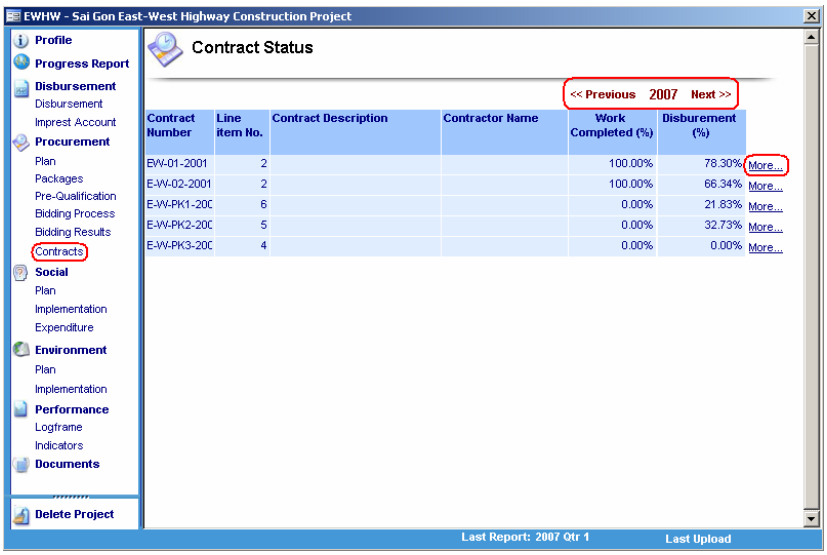
4 The window of project profile will be displayed



5 The window of Project information consists of 4 main parts

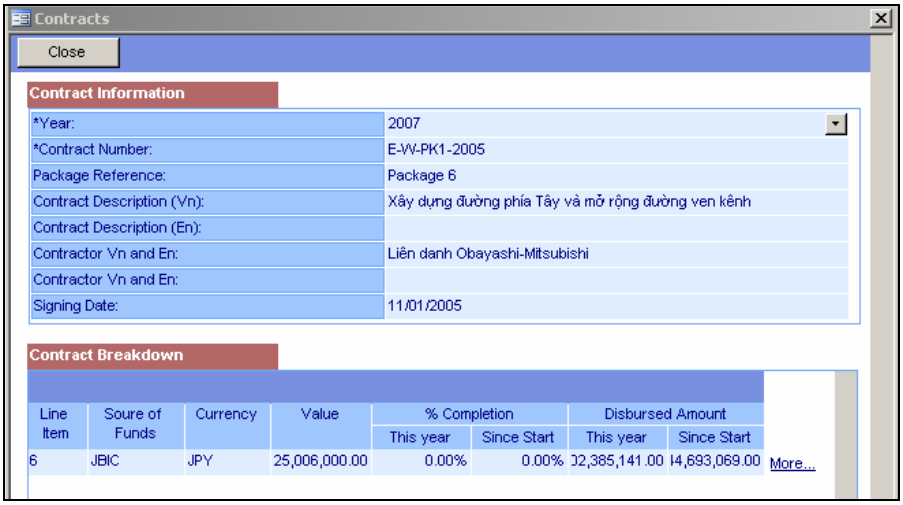
- Links of project contents in the left of window
- The main displaying window of project information
- Button **Delete Project**
- Button to close the window

6 The content in the left of window is to support viewing detailed information of project. You can view project contracts by clicking the link **Contracts**



7 In this example, the list of project contracts is shown by year. You can view contracts of previous or following year by clicking the button **Previous** or **Next**

8 To view the detailed information of a contract in the list, you can click on **More…** to display the contract details



9 Click the **Close** button to exit.

Chapter 3

III. Aggregating and Analysis functions

Queries

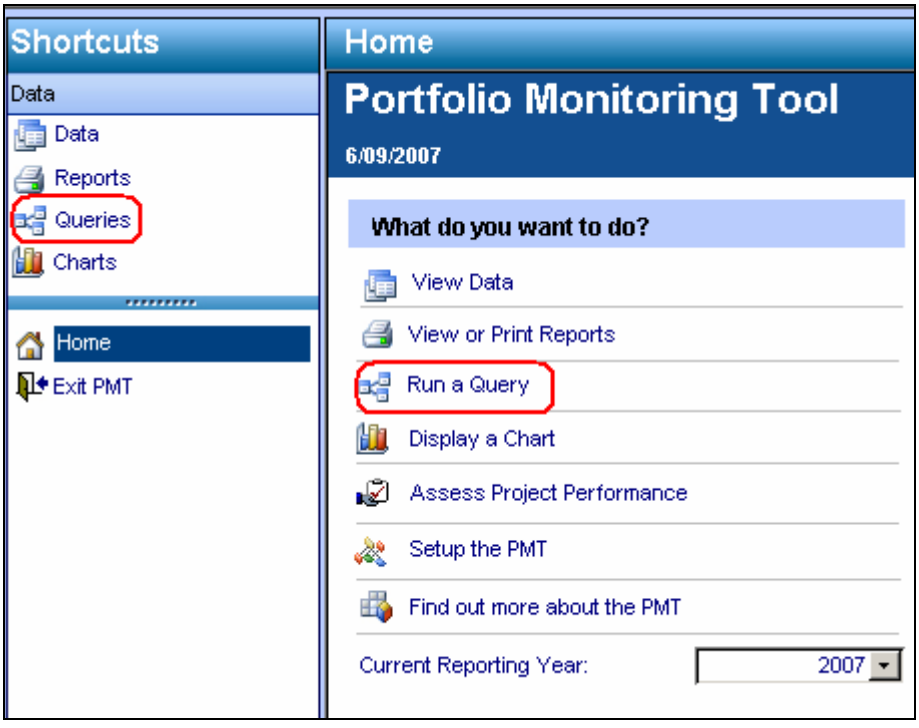
What is query?

Query is to group information in predefined criteria, which can be displayed in 'table' format for easier analysis.

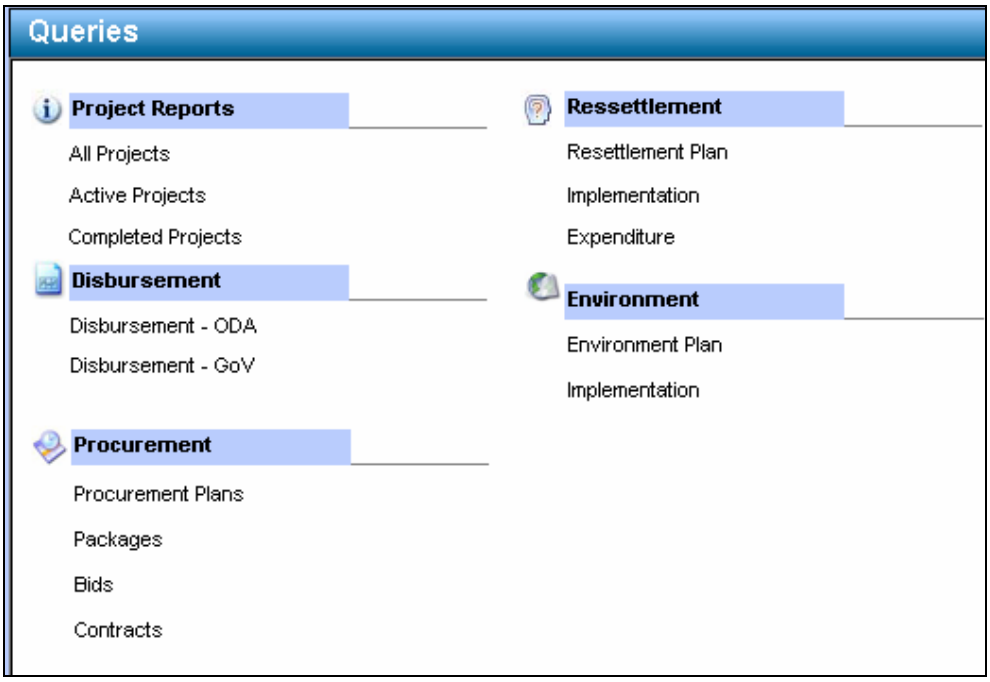
1 There are two ways to access the function Query:

- From **Homepage**, you can click the link: **Run a Query** or alternatively

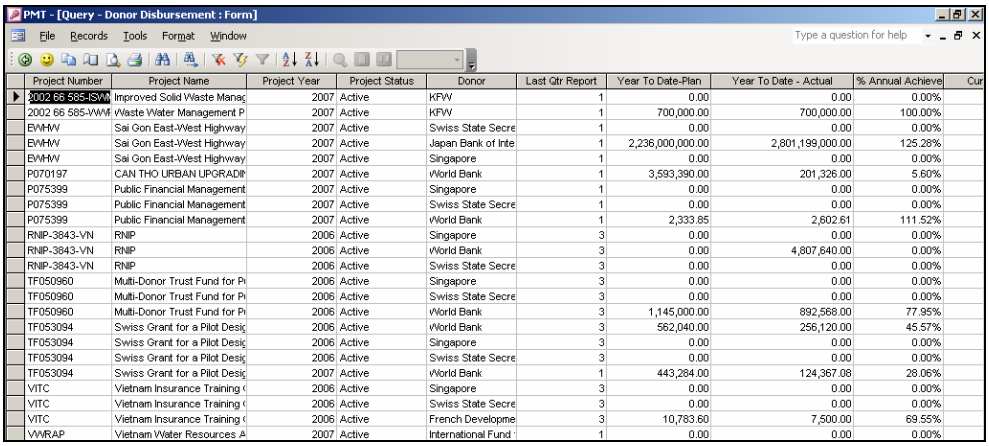
- From **Shortcut**, you can click the link **Queries**



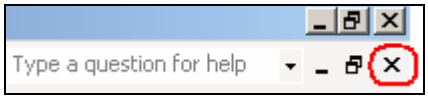
2 List of all available queries of PMT is displayed.



3 The queries are divided in groups; upon necessity you can click the relevant link. When clicking a query, the information window will be displayed in tables. The below example is to illustrate **Disbursement – ODA:**



Project Number	Project Name	Project Year	Project Status	Donor	Last Qtr Report	Year To Date-Plan	Year To Date - Actual	% Annual Achieve	Cur
2002 66 585-ISWM	Improved Solid Waste Manag	2007	Active	KFW	1	0.00	0.00	0.00%	
2002 66 585-VWM	Waste Water Management P	2007	Active	KFW	1	700,000.00	700,000.00	100.00%	
BWHW	Sai Gon East-West Highway	2007	Active	Swiss State Secre	1	0.00	0.00	0.00%	
BWHW	Sai Gon East-West Highway	2007	Active	Japan Bank of Inte	1	2,236,000,000.00	2,801,199,000.00	125.28%	
BWHW	Sai Gon East-West Highway	2007	Active	Singapore	1	0.00	0.00	0.00%	
P070197	CAN THO URBAN UPGRADIN	2007	Active	World Bank	1	3,593,390.00	201,326.00	5.60%	
P075399	Public Financial Management	2007	Active	Singapore	1	0.00	0.00	0.00%	
P075399	Public Financial Management	2007	Active	Swiss State Secre	1	0.00	0.00	0.00%	
P075399	Public Financial Management	2007	Active	World Bank	1	2,333.85	2,602.61	111.52%	
RNIP-3843-VN	RNIP	2006	Active	Singapore	3	0.00	0.00	0.00%	
RNIP-3843-VN	RNIP	2006	Active	World Bank	3	0.00	4,807,640.00	0.00%	
RNIP-3843-VN	RNIP	2006	Active	Swiss State Secre	3	0.00	0.00	0.00%	
TF050960	Multi-Donor Trust Fund for Pi	2006	Active	Singapore	3	0.00	0.00	0.00%	
TF050960	Multi-Donor Trust Fund for Pi	2006	Active	Swiss State Secre	3	0.00	0.00	0.00%	
TF050960	Multi-Donor Trust Fund for Pi	2006	Active	World Bank	3	1,145,000.00	892,568.00	77.95%	
TF053094	Swiss Grant for a Pilot Desig	2006	Active	World Bank	3	562,040.00	256,120.00	45.57%	
TF053094	Swiss Grant for a Pilot Desig	2006	Active	Singapore	3	0.00	0.00	0.00%	
TF053094	Swiss Grant for a Pilot Desig	2006	Active	Swiss State Secre	3	0.00	0.00	0.00%	
TF053094	Swiss Grant for a Pilot Desig	2007	Active	World Bank	1	443,284.00	124,367.08	28.06%	
VITC	Vietnam Insurance Training (	2006	Active	Singapore	3	0.00	0.00	0.00%	
VITC	Vietnam Insurance Training (	2006	Active	Swiss State Secre	3	0.00	0.00	0.00%	
VITC	Vietnam Insurance Training (	2006	Active	French Developme	3	10,783.60	7,500.00	69.55%	
VWRAP	Vietnam Water Resources A	2007	Active	International Fund	1	0.00	0.00	0.00%	

4 Click the button on the Menu to go back to the main query window or the cross button 

to close the query window.

Moving column

1. Access the function Query and open any query as instructed above
2. Click the title of column desired to be moved to blacken it. You can choose many neighbouring columns by clicking the first one, press the mouse and drag to broaden the selection
3. Keep the mouse and Move the blackened columns to new position.

Note: If columns are not moved, they may be freezed; therefore, you have to unfreeze those by reading below instruction.

Hiding and unhiding columns

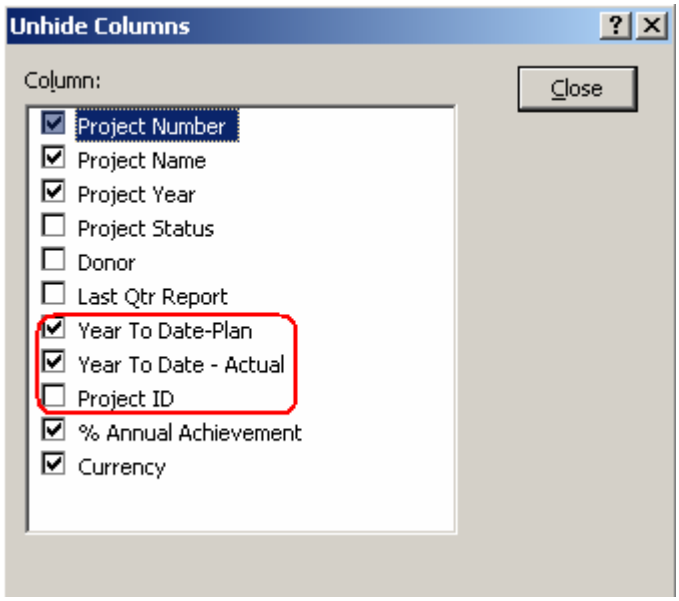
Access the function Query and open any query as instructed above

Hiding column(s)

1. Click the column header to be hidden to blacken it. You can choose many neighbouring columns by clicking the first one, press the left mouse and drag to broaden the selection
2. Access the menu **Format → Hide Columns**
3. Selected columns are hidden.

Unhiding column(s)

1. Access the menu **Format → Unhide Columns**



2 In the box displaying **Unhide Columns**, select the columns to be unhidden by ticking the relevant fields

3 Click button **Close** to exit

4 The selected columns are unhidden.

Changing the font

1 Access the function Query and open any query as instructed above

2 Access the menu **Format** → **Font** to change font, style, colour and size

3 Enter the desired format.

Note: The format change will be applied to all columns of query.

Changing the gridline or background colour

1 Access the function Query and open any query as instructed above

2 Access the menu **Format** → **Cells** to change the gridline or background colour

3 Enter the desired format.

Note: The format change will be applied to all columns of query.

Filtering records

You can filter by using the tool **Filter by Selection.**

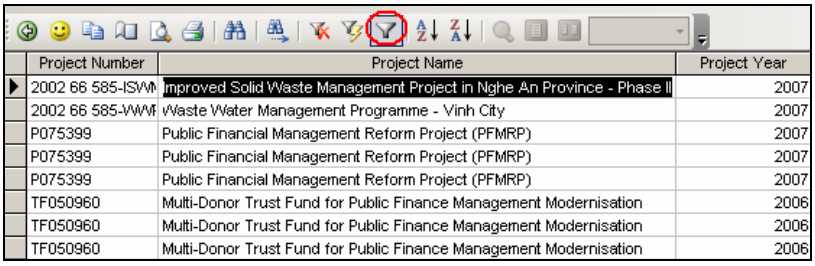
1 Access the function Query and open any query as instructed above

2 Click the field to be filtered in the query

3 You can select all or a part of field by selecting the part to be filtered. The below example shows that user wants to filter projects with name consisting of “management”:

	Project Number	Project Name	Project Year
	2002 66 585-ISWM	Improved Solid Waste Management Project in Nghe An Province - Phase II	2007
	2002 66 585-WWM	Waste Water Management Programme - Vinh City	2007
	EWHW	Sai Gon East-West Highway Construction Project	2007
	EWHW	Sai Gon East-West Highway Construction Project	2007
	EWHW	Sai Gon East-West Highway Construction Project	2007
	P070197	CAN THO URBAN UPGRADING PROJECT	2007
▶	P075399	Public Financial Management Reform Project (PFMRP)	2007
	P075399	Public Financial Management Reform Project (PFMRP)	2007
	P075399	Public Financial Management Reform Project (PFMRP)	2007

4 Click the symbol in toolbar to perform **Filter By Selection**



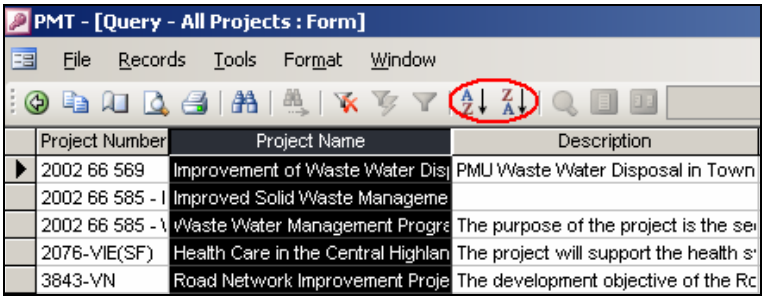
Project Number	Project Name	Project Year
2002 66 585-ISWM	Improved Solid Waste Management Project in Nghe An Province - Phase II	2007
2002 66 585-WWM	Waste Water Management Programme - Vinh City	2007
P075399	Public Financial Management Reform Project (PFMRP)	2007
P075399	Public Financial Management Reform Project (PFMRP)	2007
P075399	Public Financial Management Reform Project (PFMRP)	2007
TF050960	Multi-Donor Trust Fund for Public Finance Management Modernisation	2006
TF050960	Multi-Donor Trust Fund for Public Finance Management Modernisation	2006
TF050960	Multi-Donor Trust Fund for Public Finance Management Modernisation	2006

5 Click the symbol **Remove Filter** in toolbar to be back to normal.

Sorting Columns

1 Access the function Query and open any query as instructed above

2 Select a column to be sorted by clicking its column header


PMT - [Query - All Projects : Form]
File Records Tools Format Window
Project Number
Project Name
Description
2002 66 569
Improvement of Waste Water Disp
PMU Waste Water Disposal in Town
2002 66 585 - I
Improved Solid Waste Manageme
2002 66 585 - V
Waste Water Management Progra
The purpose of the project is the se
2076-VIE(SF)
Health Care in the Central Highlan
The project will support the health s
3843-VN
Road Network Improvement Proje
The development objective of the Rc

3 Click the symbol or to sort ascending or descending

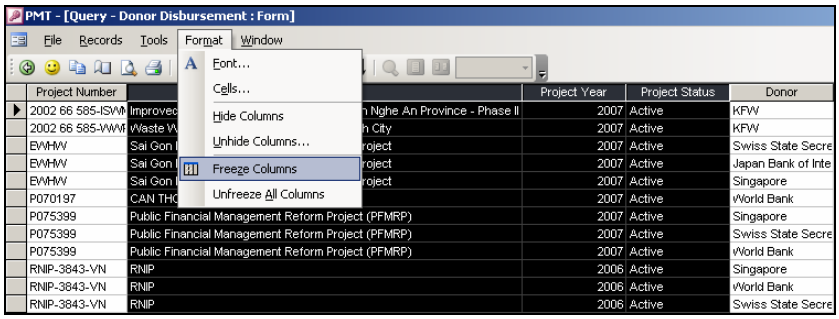
4 Click the symbol in tool bar to be back to normal.

Freezing or unfreezing columns

1 Access the function Query and open any query as instructed above

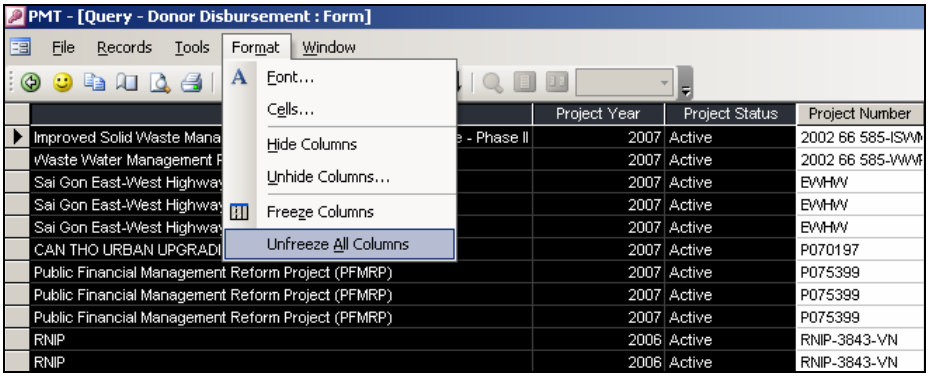
2 Select a column by clicking its column header to be moved. You can choose many neighbouring columns by clicking the first one, press the mouse and drag to broaden the selection

3 Select **Freeze columns** of menu **Format** to freeze selected columns



4 The selected columns will be freezed and moved to leftmost.

5 In order to unfreeze columns, access **Unfreeze All Columns** of menu **Format**



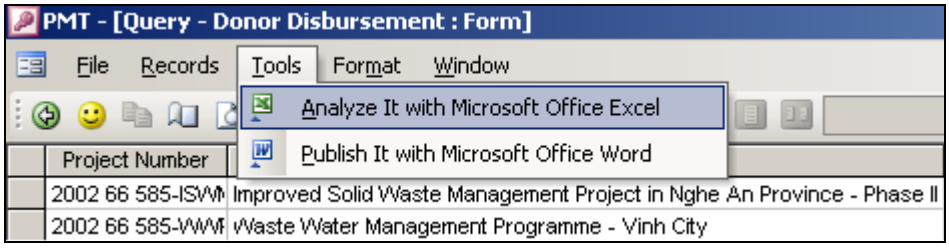
6 After unfreezing, the position of columns will not be recovered like before. You can move columns depending necessity.

Exporting a query to Excel or Word

1 Access the function Query and open any query as instructed above

2 Hide unnecessary columns or use filter function to have the query content as required

3 Access menu **Tools**, select **Analyse it with Microsoft Office Excel** or **Publish it with Microsoft Office Word**


PMT - [Query - Donor Disbursement : Form]
File
Records
Tools
Format
Window
Analyze It with Microsoft Office Excel
Publish It with Microsoft Office Word
Project Number
2002 66 585-ISWM
Improved Solid Waste Management Project in Nghe An Province - Phase II
2002 66 585-WWM
Waste Water Management Programme - Vinh City

4 Query will be exported in documents in desired format

Note: Query is structured in 'tables', therefore the table format is difficult to maintain when being exported to MS Word but can be kept when being exported to MS Excel.

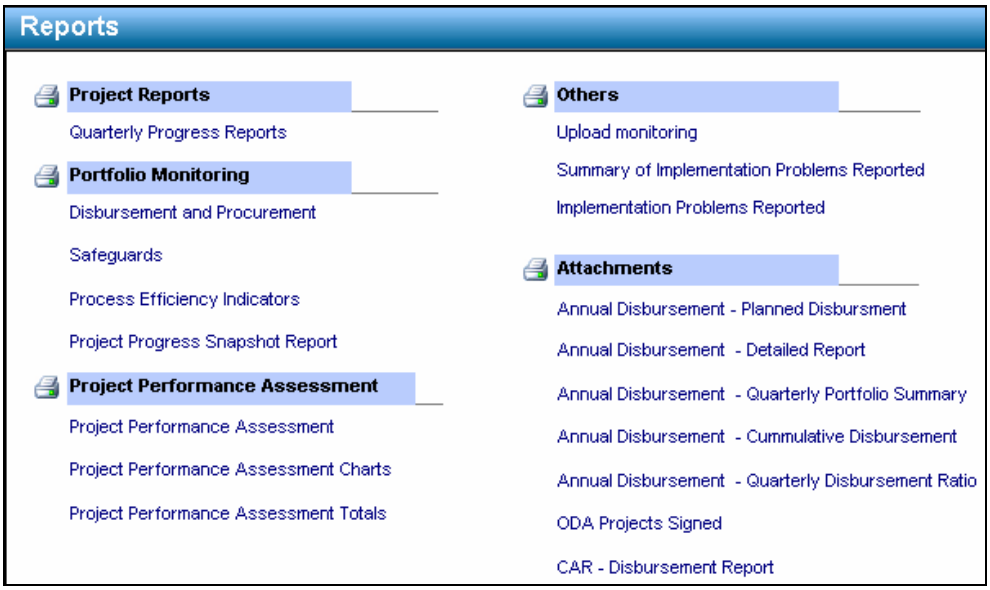
Reports

To access and view reports

1 There are two ways to access **Reports** of PMT:

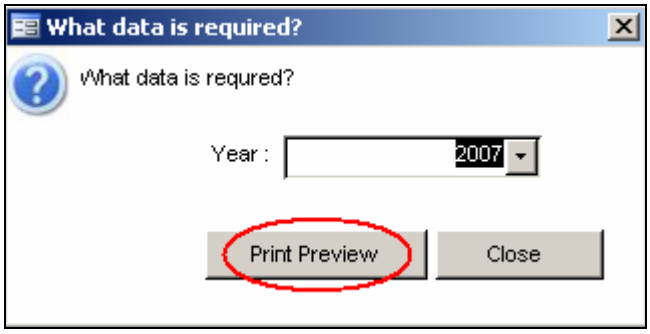
- From **Homepage**, click the link: **View or Print reports**
- From **Shortcut**, click the link **Reports**

2 The list of pre-formatted **Reports** is shown in the main window of PMT

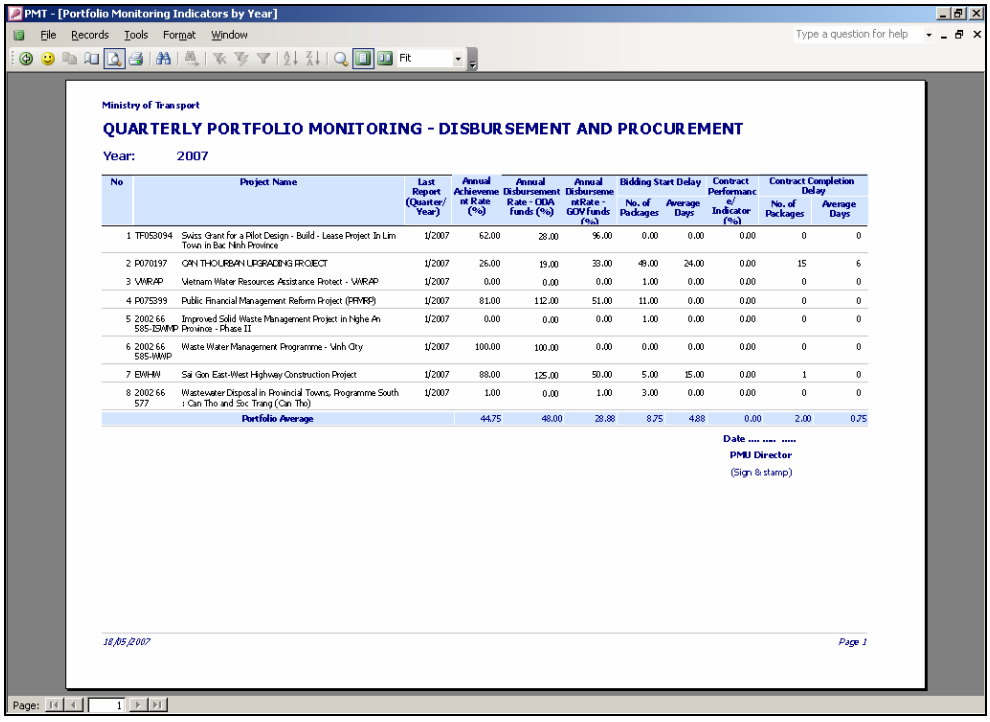


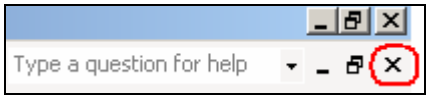
3 Upon necessity, you can click the link of corresponding report

4 In some reports, there are requests to input some report parameters such as reporting year, project, sector, group sector…



5 After selection of report parameters, click **Print Preview**

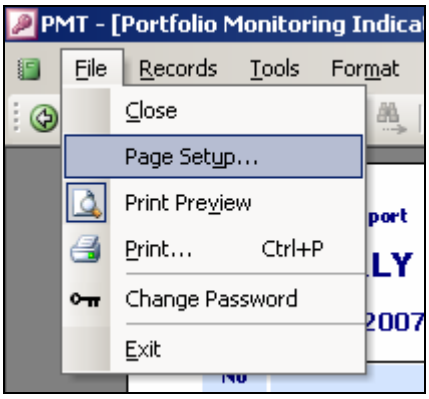


6 Click the button in Menu to go back to the window of Reports or the cross button  to close window.

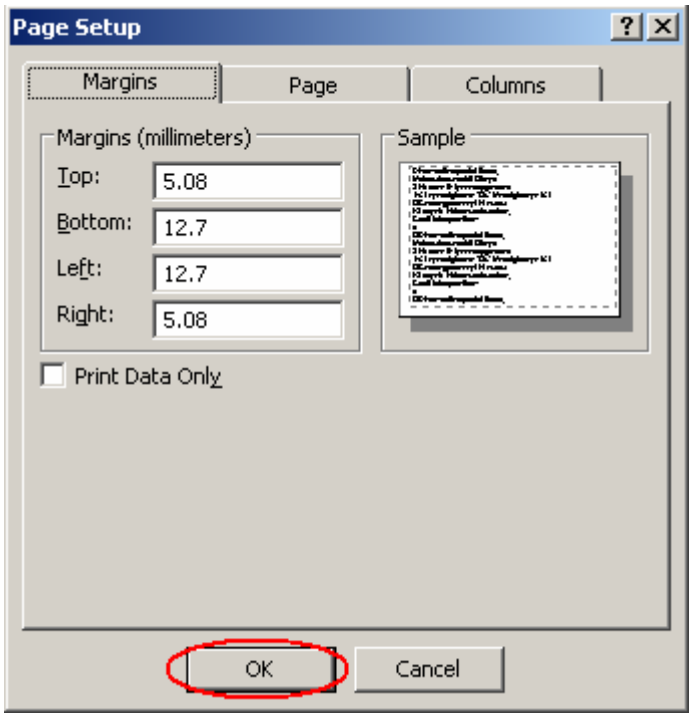
Page set-up

1 Access Reports and select any report as instructed above

2 Select **Page Setup…** from menu **File**



3 The window for Page set-up is displayed to enable user to change margin, orientation or grid settings



4 Click OK to save changes

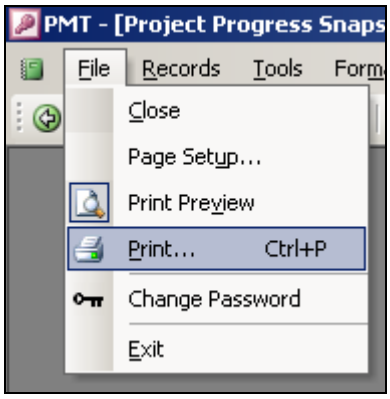
To print reports

1 Access Reports and select any report as instructed above

2 Set up page (is necessary)

3 Click button in tool bar to print report

4 Or you can access **Print …** in menu **File** to have more printing options.

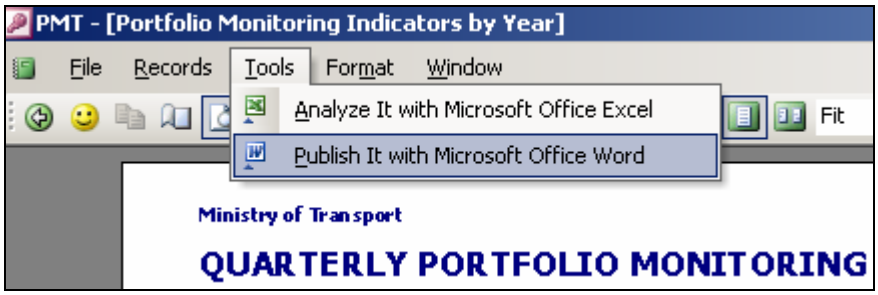


To export report to MS Excel or MS Word

1 Access Reports and select any report as instructed above

2 Set up page (is necessary)

3 Access menu **Tools**, select **Analyse It with Microsoft Office Excel** or **Publish It with Microsoft Office Word**



4 Reports will be exported in documents in desired format.

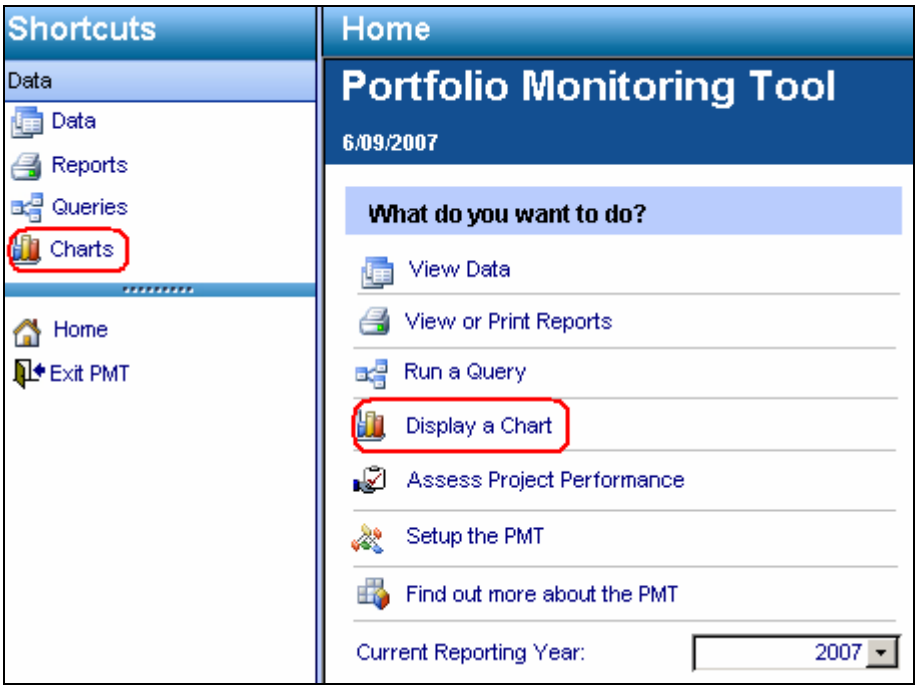
Note: Reports are structured in 'tables' and string, therefore the report format is difficult to maintain when being exported to MS Excel but can be kept when being exported to MS Word.

Charts

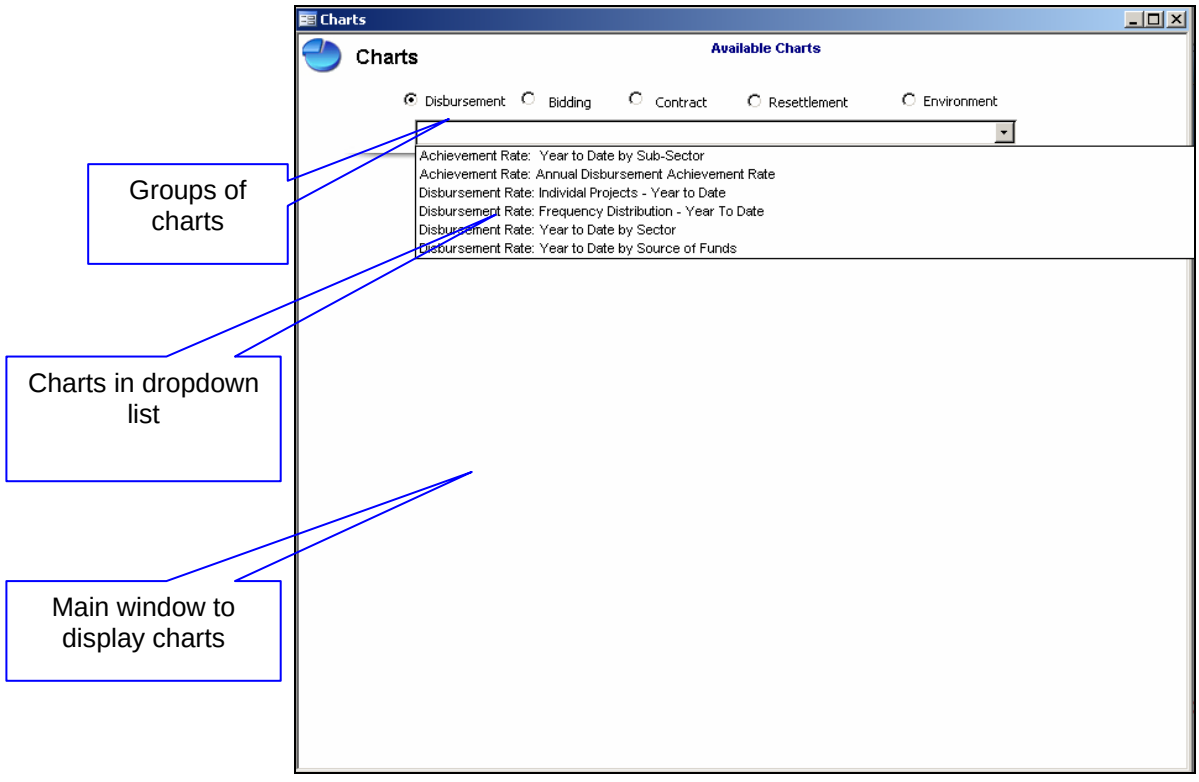
To access and display charts

1 There are two ways to access **Charts** of PMT:

- From **Homepage**, click the link **View charts** or alternatively
- From **Shortcuts**, click the link **Charts**



2 The window of **Charts** is displayed



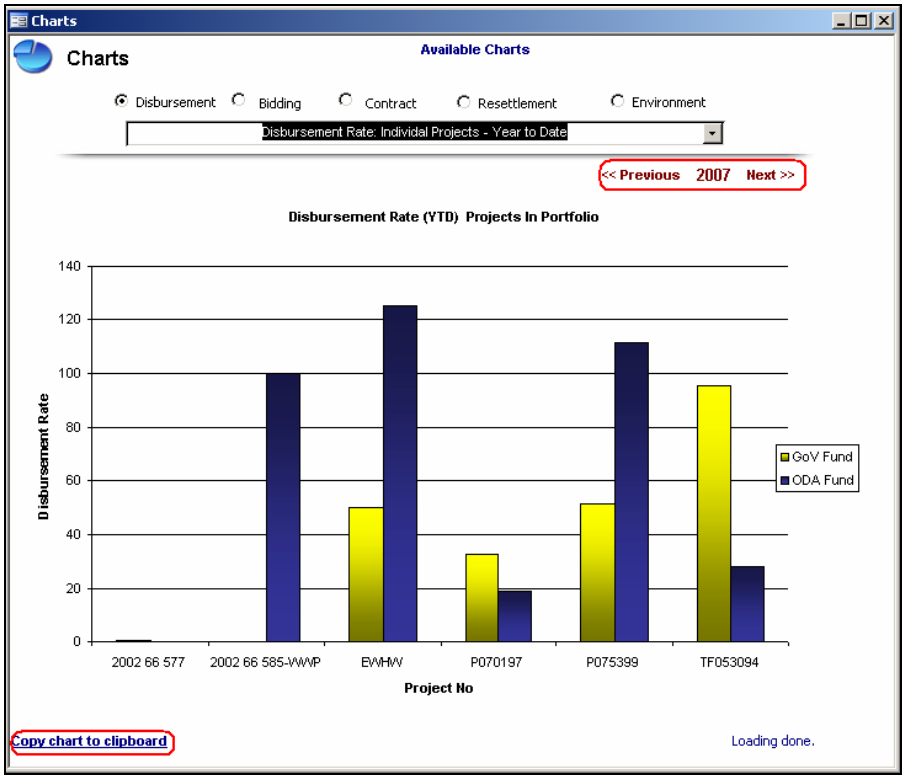
3 Select a desired chart by:

- Clicking the relevant group
- Select the chart from the dropdown list in selected group.

4 Depending on the chart type, you may have to provide more chart parameter(s) such as Sector Level1, Main source of funds, Project , etc

Select project to display in chart
Select project to display
Check All
Project No
ProjectName
TF053094 Swiss Grant for a Pilot Design - Build - Lease Project In Lim Town in Bac Ninh Pr
TF050960 Multi-Donor Trust Fund for Public Finance Management Modernisation
VITC Vietnam Insurance Training Centre
RNIP-3843-VN RNIP
P070197 CAN THO URBAN UPGRADING PROJECT
VWRAP Vietnam Water Resources Assistance Protect - VWRAP
P075399 Public Financial Management Reform Project (PFMRP)
2002 66 585-ISWM Improved Solid Waste Management Project in Nghe An Province - Phase II
2002 66 585-WWP Waste Water Management Programme - Vinh City
EWHW Sai Gon East-West Highway Construction Project
2002 66 577 Wastewater Disposal in Provincial Towns, Programme South : Can Tho and Soc
Accept
Close

5 After selecting parameters, click **Accept** to see Charts in the below window



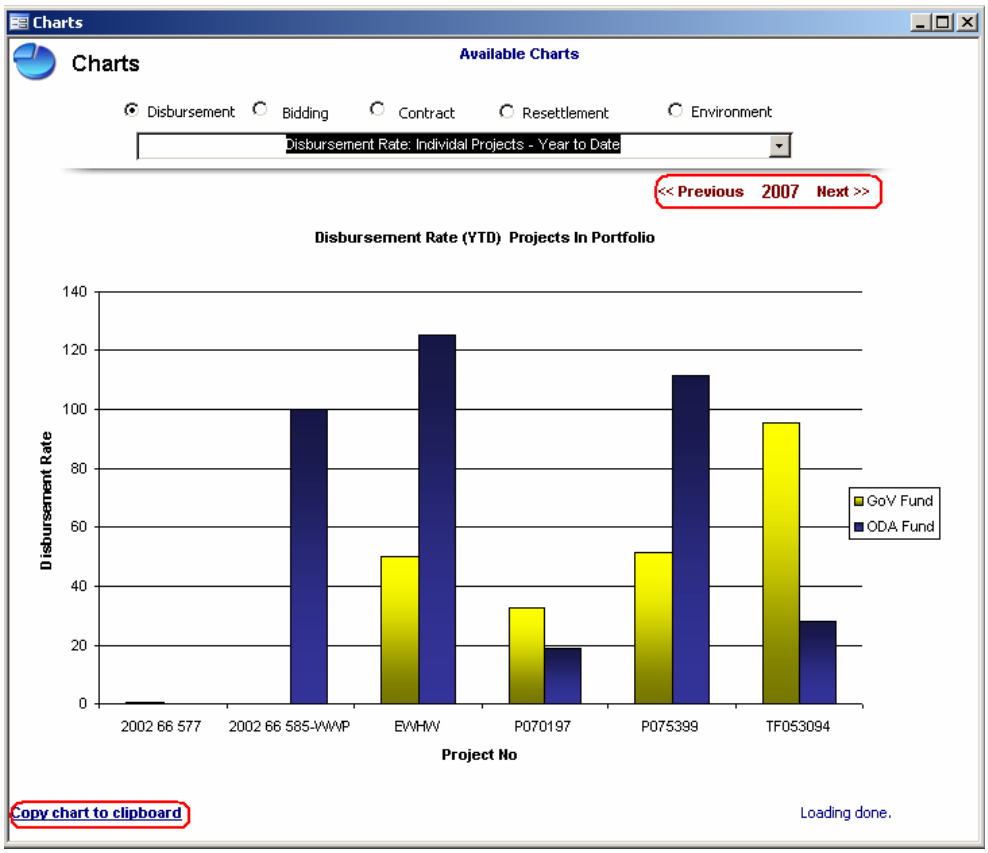
6 For each chart, you can view charts of previous or following year by clicking **Previous** or **Next**

7 Click to exit

To copy charts to other Office documents

1 Access Chart and display any chart as instructed above

2 When a chart is selected and displayed, click **Copy chart to clipboard**



3 Open the MS Office document (Word, Excel,…) for charts to be saved

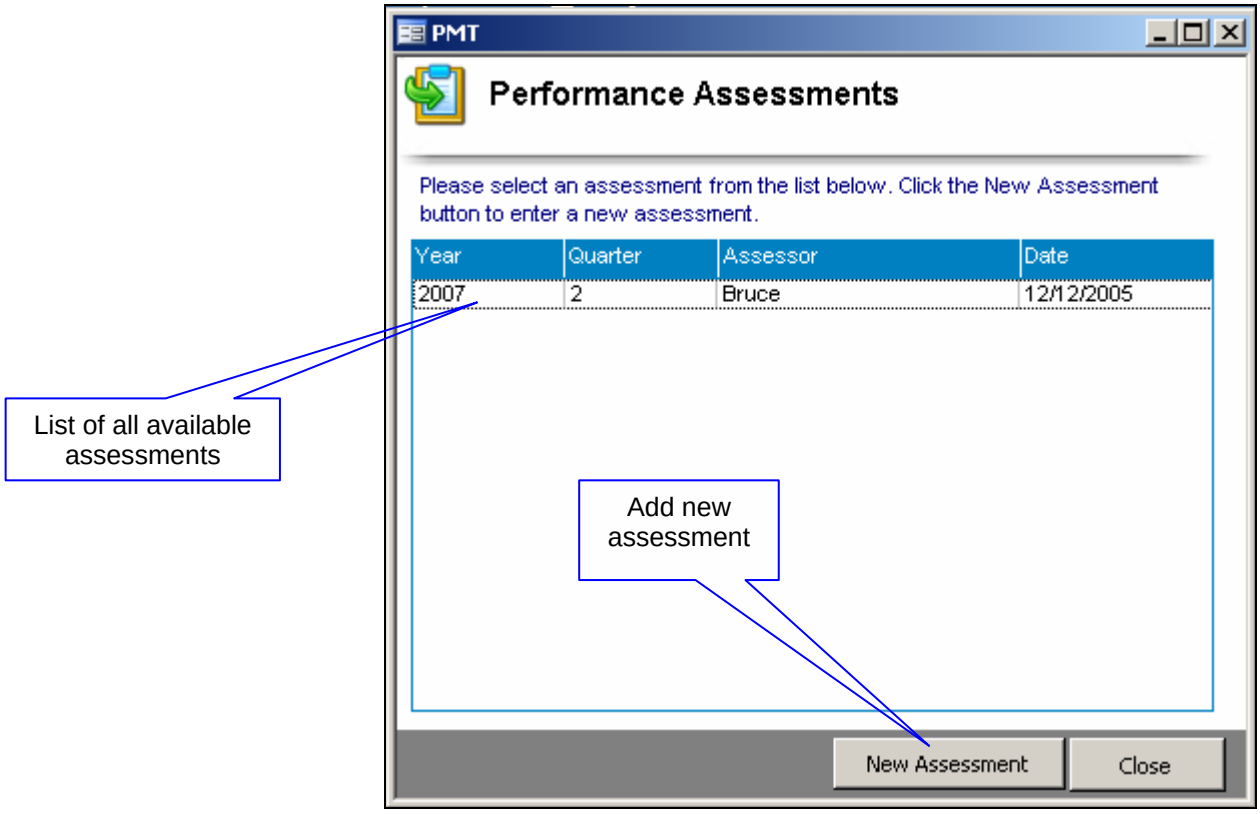
4 Right click and choose **Paste** in the above document, chart will be saved there. You can also edit charts after copying to Word, Excel as one MS Office object.

Assess Project Performance

Access to assessment function

1 In the **Home page**, click on the link **Assess Project Performance**

2 **List of Assessments** window is displayed

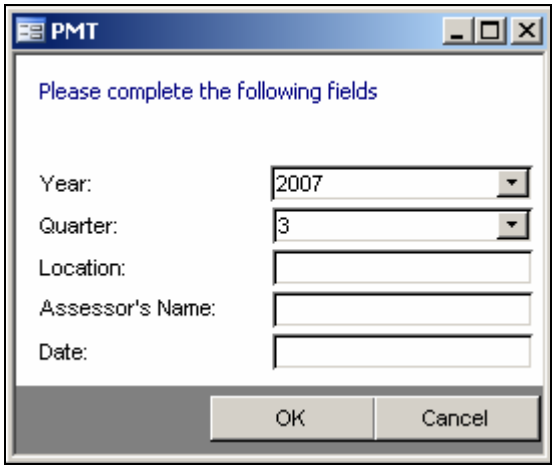


Add new assessment

1 Access to the assessment function as instructed above

2 If there is NO assessment in the list of available assessments corresponding to your assessment quarter and year, click on the button **New assessment**

3 The window allowing to add a new assessment is displayed



4 Please fill in all information needed for a new assessment

5 Click **OK** button to save and close

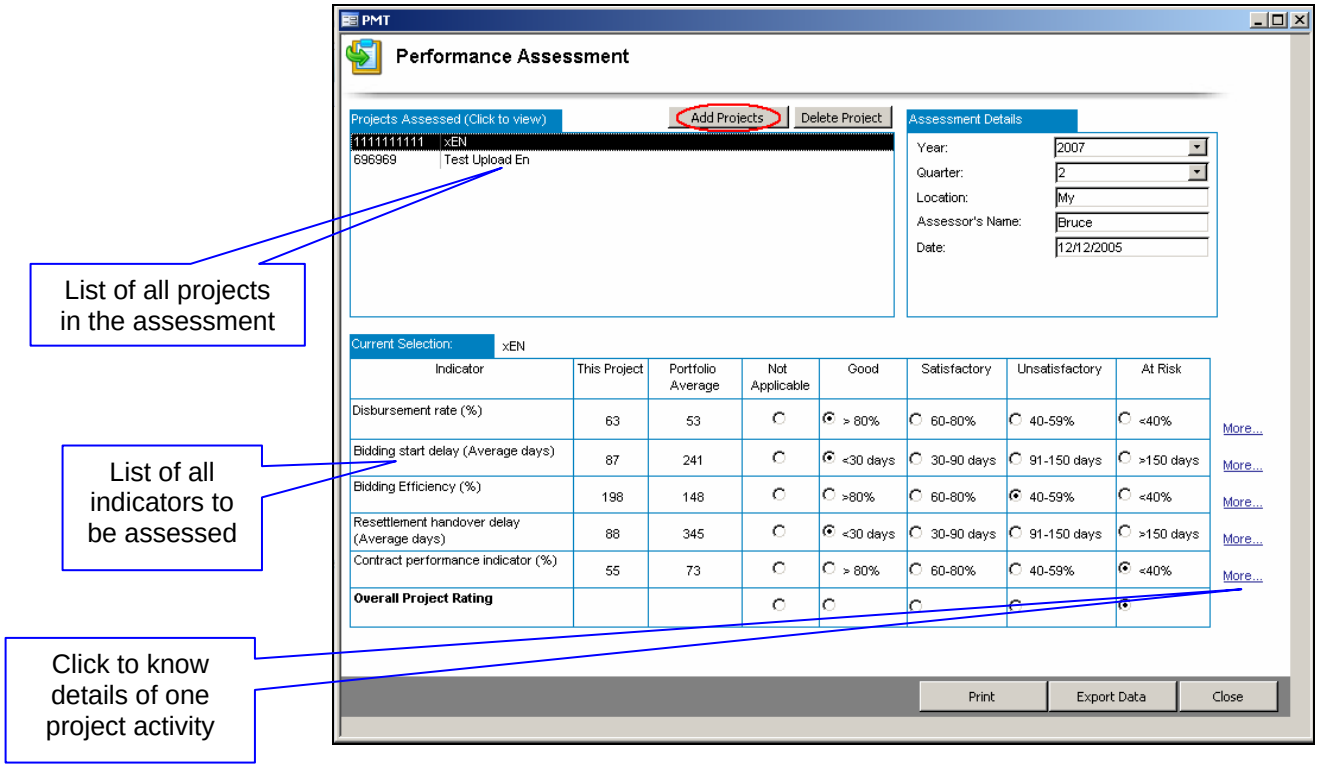
Assess project(s)

1 Access to the assessment function as instructed above

2 If necessary, add new assessment corresponding to your quarter and year

3 Select one assessment in the list of available assessments by click once on the desired record

4 The assessment window is displayed



5 To know about the assessment for one project, click on the project in the list of all projects. If your desired project has not appeared in the list, click on the **Add Projects** button to put your project in this assessment

6 If one project in the list of all projects is not needed in this assessment, click on **Delete Project** to remove that project out of the list

7 For each project, there are 5 assessment indicators, which are displayed with values for that project and average of the whole portfolio

8 Based on the values of 5 indicators, the assessor should mark for each indicator either Good, Satisfactory, Unsatisfactory or At Risk

9 After assessing for 5 indicators, the assessor should mark the overall project rating either Good, Satisfactory, Unsatisfactory or At Risk

10 After assessing for all projects, click **Print** button if you wanted a printed report

11 After assessing for all projects, click **Export Data** button to export this assessment to an XML file. This file then can be sent by email to the

National ODA management agencies like MPI, MOF to report on the assessment of your portfolio.

12 Click **Close** button to close the assessment window

Chapter

4

IV. Upload to PMT

As mentioned above, PMT is a tool for data display and analysis. Therefore, data input for PMT is important to ensure that the tool has data for processing. Upload is automatically done by importing data from AMT report(s) (in Excel) sent from PMUs.

AMT management and conditions

Conditions for AMT upload

Upload can be done only if AMT report(s) satisfy the followings:

1 Each AMT report has a unique project code in all portfolio;

2 Each AMT report has the reporting quarter and year in correspondence with actual reporting time; and

3 Each AMT report is updated with appropriate and adequate information up to the reporting time and verified by project owners.

To manage AMT files by quarter

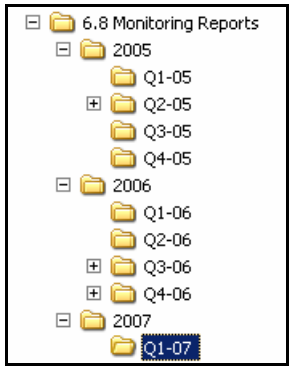
1 Usually, AMT report is saved in soft copy. The file name is recommended to give as followings:

Donor (short name) – LA (short name) – Project (short name) – Reporting quarter – Reporting year.xls

2 AMT report should be saved by quarter. The file tree is recommended to be as followings:

Reporting quarter – Reporting year – AMT reports

E.g.:

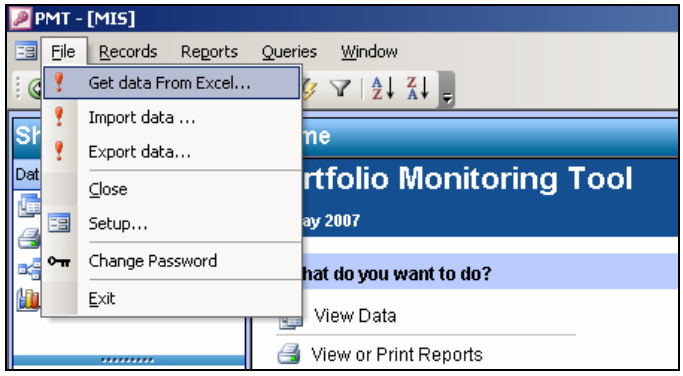


To upload data from AMT to PMT

To upload data to PMT, user has to access its system menu, usually when sub-windows are closed and only main window is displayed.

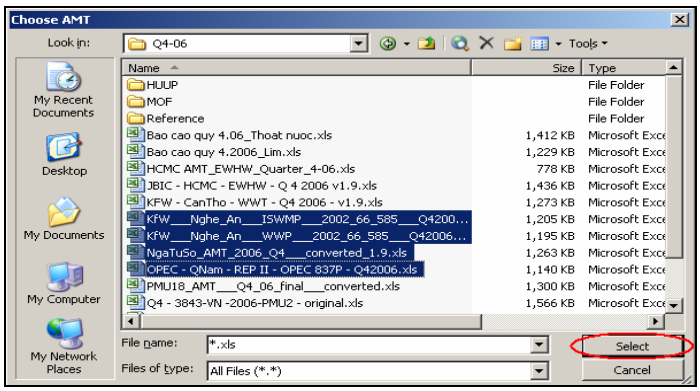
To upload data

1 Select **Get data from Excel** in menu File



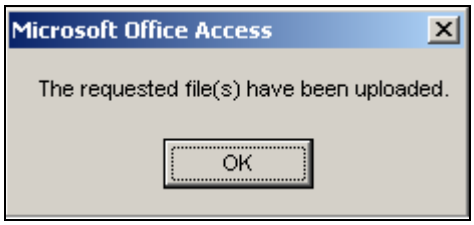
2 Use dialog box to go to folder of AMT reports satisfying conditions for upload

3 Click the AMT report to be updated. If you want to update many AMT reports as once, press Shift or Ctrl when clicking to select files



4 Click **Select**

5 The upload is completed when you receive the following notice:



FAQ

1 Frequency for AMT uploads to PMT?

A: Usually 4 times/year in relevance to 4 reporting quarters; Monitoring officers should collect all appropriate AMT reports before update to save time. In case some reports are wrong or amended after uploading to PMT, M&E officer will update PMT again with latest verified AMT reports.

2 What to do with project with no project code?

A: Now Government of Vietnam (GoV) has not yet had procedure to issue code for project, almost all projects get the code issued by donors. In case a project does not have any code, you can contact person-in-charge of ODA in MPI to get a temporary code to ensure the code solidarity in all portfolio.

3 After uploading AMT, how will be old data of a project in previous quarter?

A: If report is for Quarter I of reporting year, the old data of project of previous years is kept unchanged while the new data is recorded for the current reporting year. If report is for Quarter II, III or IV of reporting year, the old data of project of reporting year will be deleted and replaced by new data of AMT because AMT is to list all information of all quarters in the year.

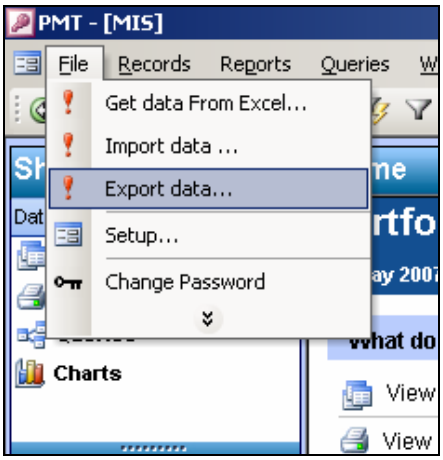
To export and import data from PMT to PMT

Exporting and importing data from PMT to PMT is to support an agency using PMT to manage ODA programs and projects with aim to send information and

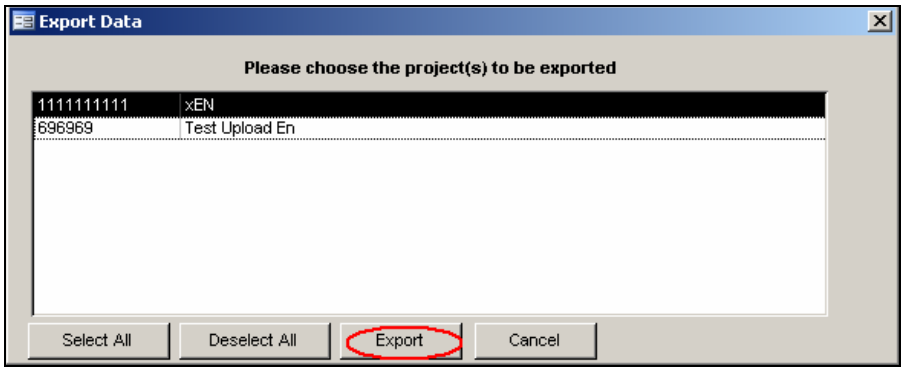
data to other agency using PMT while not sending many AMT reports. E.g.: CPO - Irrigation manages 10 projects and wants to send information to MARD in one file instead of sending 10 AMT reports.

To export data from PMT

1 Select **Export data…** in menu **File**



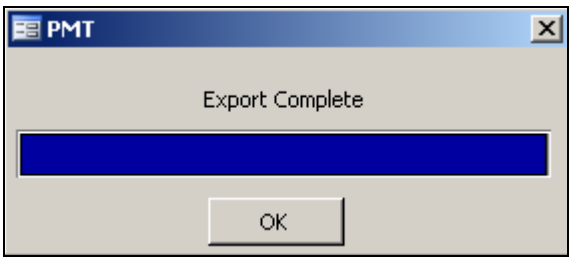
2 The below window is to choose projects to be extracted



3 Click the project(s) to be extracted

4 Click **Export** to export data

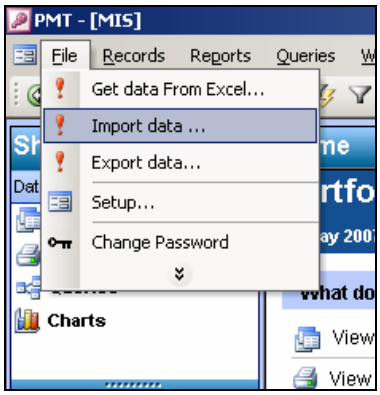
5 Exporting data is done when you receive the following notice:



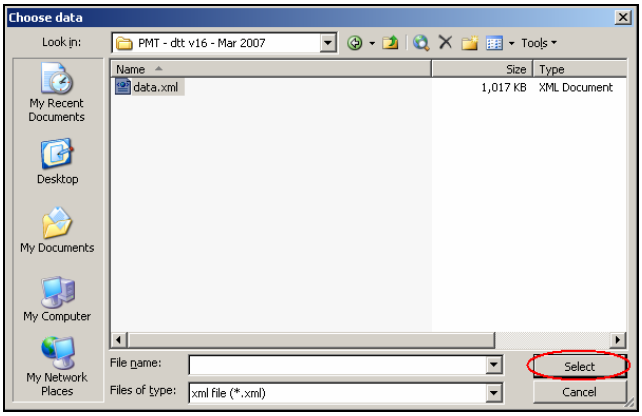
6 In the installed folder of PMT, there is a file named **data.xml** then. This is the file of data extracted from PMT. You can change its name as desired.

To import data to PMT

1 Select **Import data …** in menu **File**

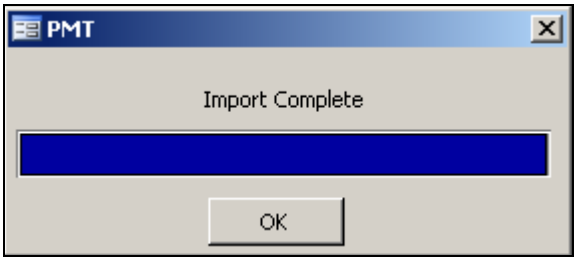


2 Use dialog box to find the folder of file to be updated



3 Click **Select** to start importing

4 Data is imported when you receive the following notice:



Chapter 5

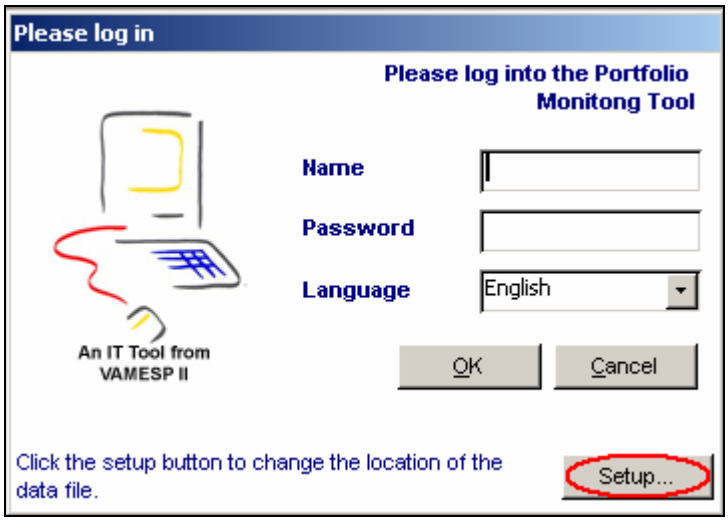
V. PMT Set up

To set up linkage to database

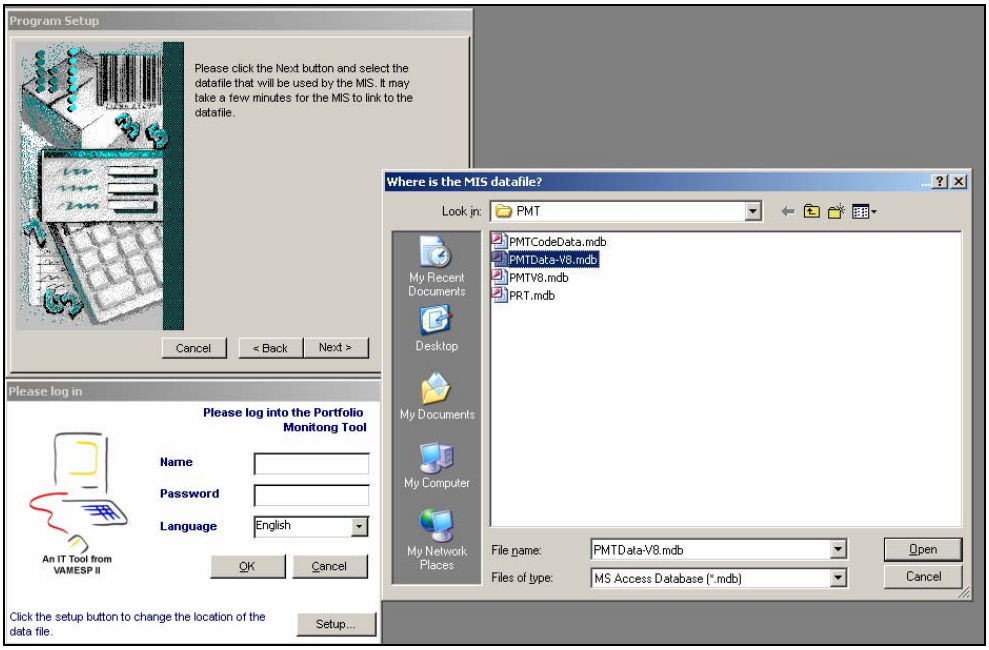
For setting up linkage to database, System Administrator needs only perform it once and can change it in case address of current data files is changed.

1 Access by double clicking the icon PMT

2 Before entering username and password, click **Setup…**

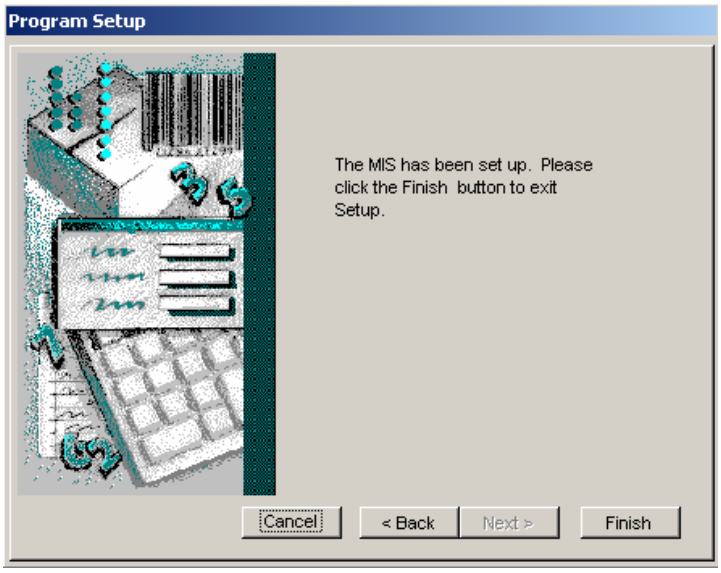


3 The below window is to select data file



4 Select data file for PMT

5 Click Next repeatedly until the screen of setup completion is displayed

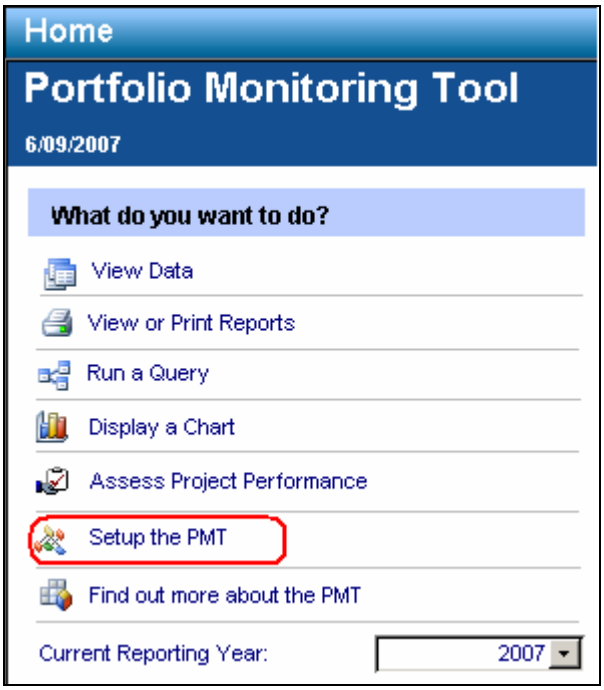


6 Click **Finish** to complete the setup

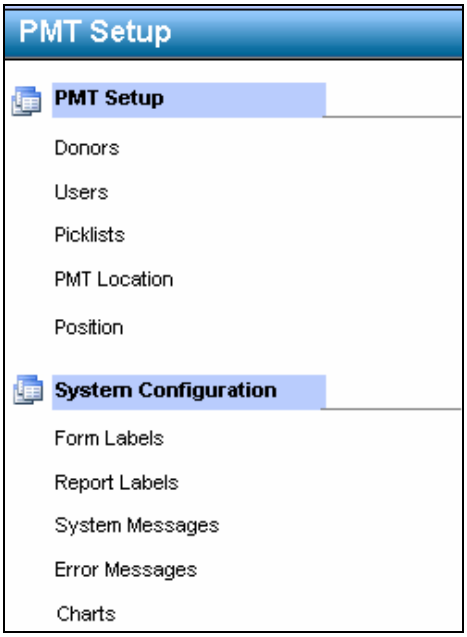
7 Then you can use your username and password to access the program as instructed in Chapter 2

To set up the PMT

1 The System Administrator accesses **Setup the PMT** in homepage



2 The PMT window displays list of content to be set up

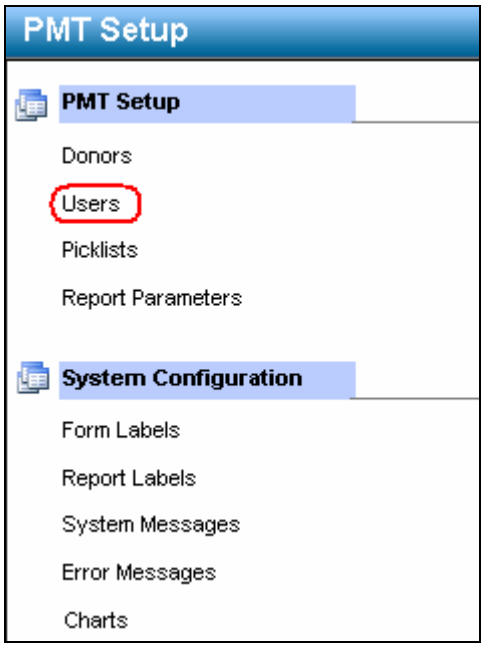


To add or edit users

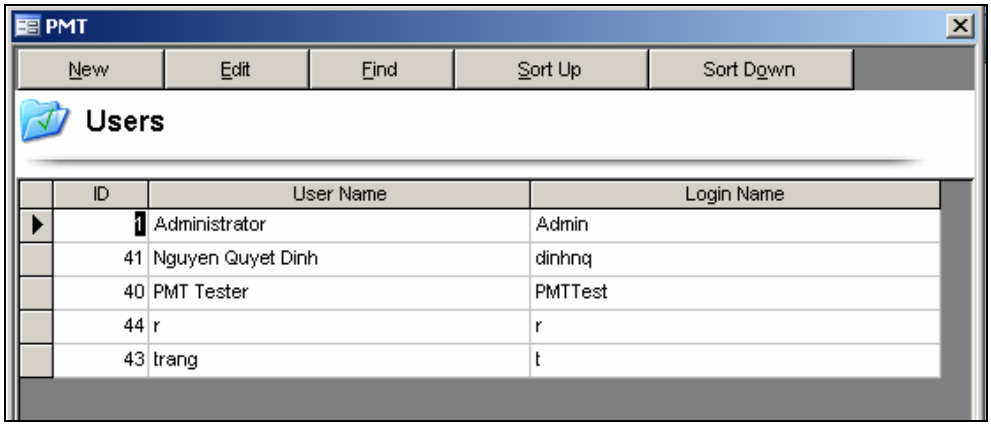
To access user setup

1 Access the list of setting up content as instructed above

2 Click the link **Users** in the list



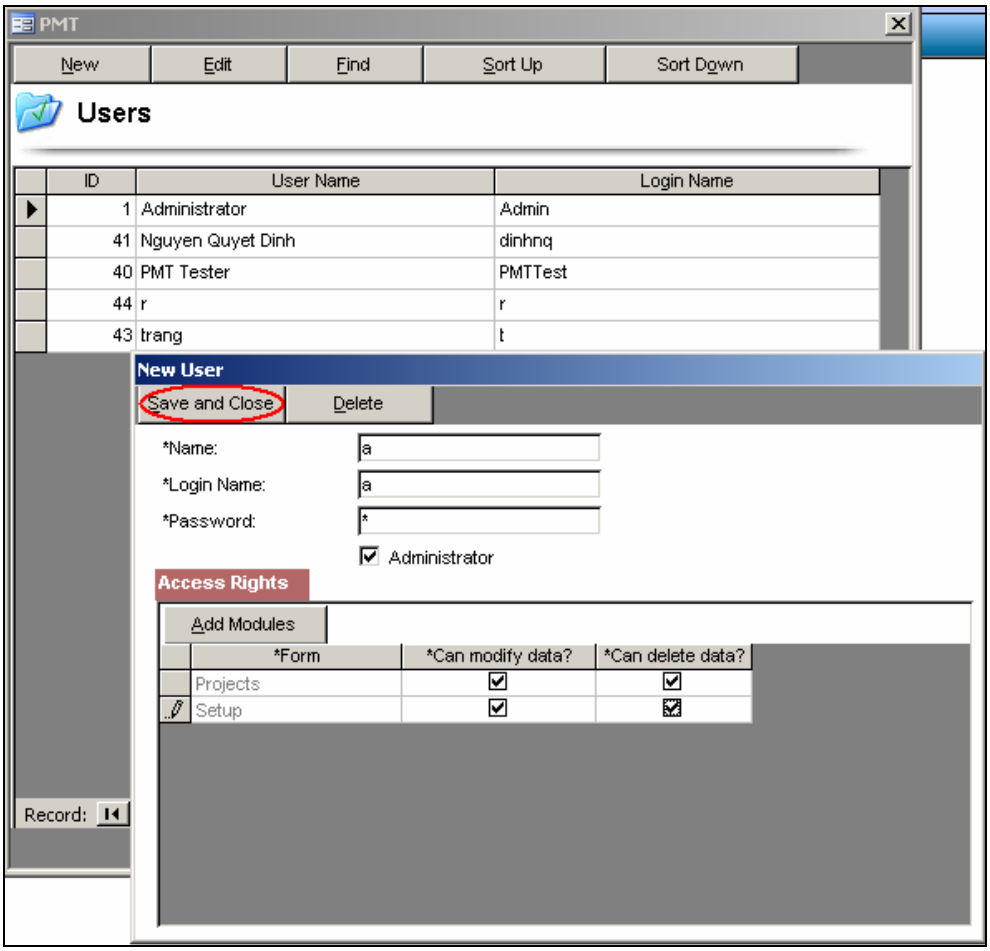
3 The window of list of current users and buttons such as **New, Edit, Find, Sort up** and **Sort down** is displayed:



To add a new user

1 Access the window of Users as instructed above

2 Click **New** to display a new window for adding



3 Fill in the compulsory information like User name, login name, password

4 If the new user is assigned for administration, tick the box **Administrator**

5 Click **Add Modules** and assign rights for the new user by selecting modules showing that the new user can modify or delete data

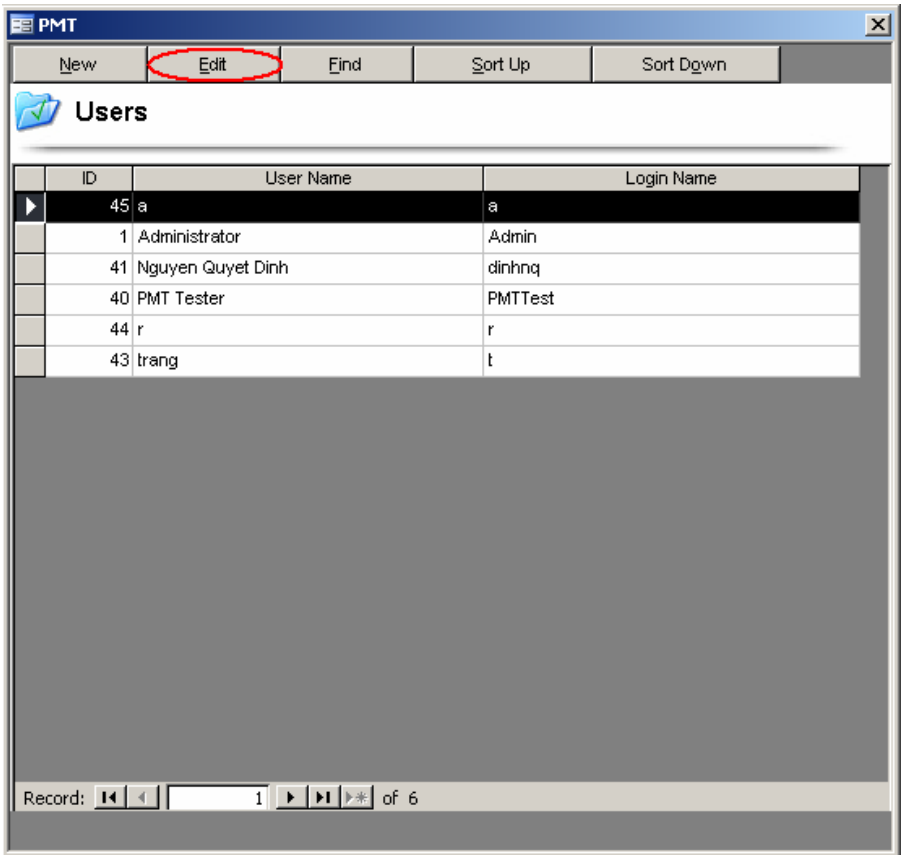
6 Click **Save and Close**

To edit an existing user

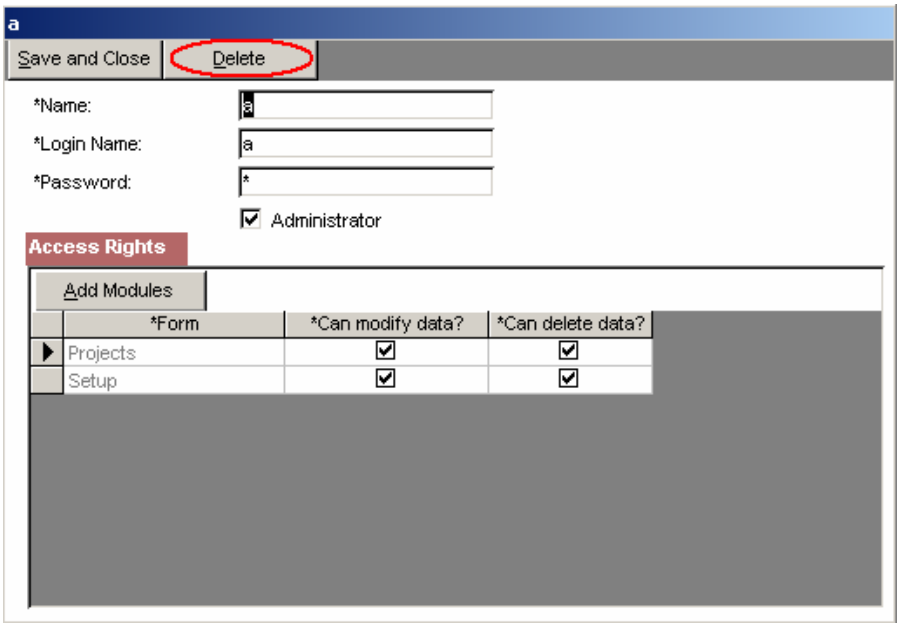
1 Access the window of **Users** as instructed above

2 Select one user to be edited by clicking on the row header

3 Click **Edit** to display a window for editing user information



4 Like to add new user, you can modify the user information by filling in any to-be-modified content as desired or click **Delete** to delete this user

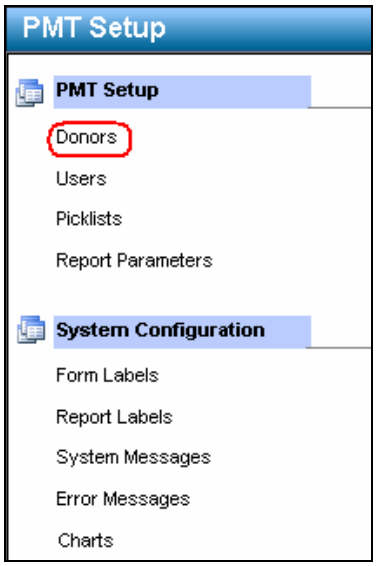


To add or edit donors

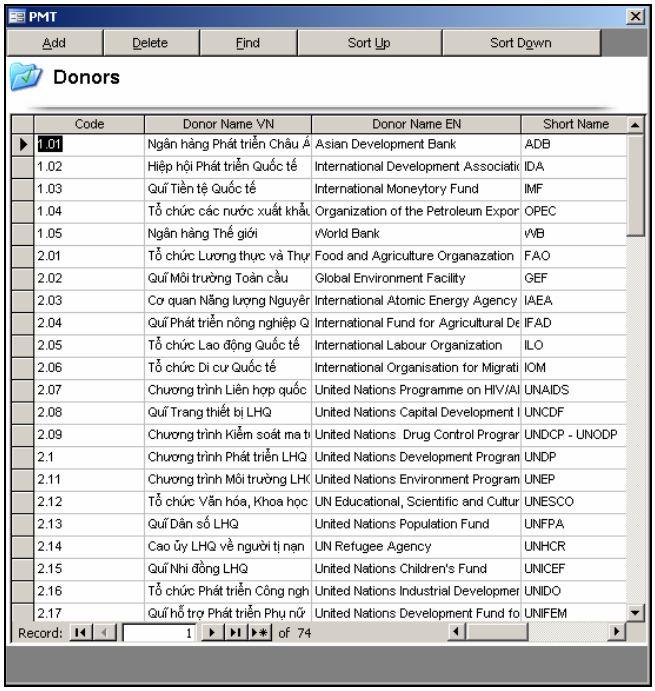
To access donor setup

1 Access the list of content to be set up as instructed above

2 Click the link **Donors**



3 The window of list of current donors and buttons such as **Add, Delete, Find, Sort up and Sort down** is displayed


PMT
Add
Delete
Find
Sort Up
Sort Down
Donors
Code
Donor Name VN
Donor Name EN
Short Name
1.01 Ngân hàng Phát triển Châu Á Asian Development Bank ADB
1.02 Hiệp hội Phát triển Quốc tế International Development Associati IDA
1.03 Quĩ Tiền tệ Quốc tế International Moneytory Fund IMF
1.04 Tổ chức các nước xuất khẩu Organization of the Petroleum Expor OPEC
1.05 Ngân hàng Thế giới World Bank WB
2.01 Tổ chức Lương thực và Thự Food and Agriculture Organazation FAO
2.02 Quĩ Môi trường Toàn cầu Global Environment Facility GEF
2.03 Cơ quan Năng lượng Nguyên International Atomic Energy Agency IAEA
2.04 Quĩ Phát triển nông nghiệp Q International Fund for Agricultural De IFAD
2.05 Tổ chức Lao động Quốc tế International Labour Organization ILO
2.06 Tổ chức Di cư Quốc tế International Organisation for Migrati IOM
2.07 Chương trình Liên hợp quốc United Nations Programme on HIV/AI UNAIDS
2.08 Quĩ Trang thiết bị LHQ United Nations Capital Development I UNCDF
2.09 Chương trình Kiểm soát ma t United Nations Drug Control Prograr UNDCP - UNODP
2.1 Chương trình Phát triển LHQ United Nations Development Progran UNDP
2.11 Chương trình Môi trường LHQ United Nations Environment Program UNEP
2.12 Tổ chức Văn hóa, Khoa học UN Educational, Scientific and Cultur UNESCO
2.13 Quĩ Dân số LHQ United Nations Population Fund UNFPA
2.14 Cao ủy LHQ về người tị nạn UN Refugee Agency UNHCR
2.15 Quĩ Nhi đồng LHQ United Nations Children's Fund UNICEF
2.16 Tổ chức Phát triển Công ngh United Nations Industrial Developmer UNIDO
2.17 Quĩ hỗ trợ Phát triển Phụ nữ United Nations Development Fund fo UNIFEM
Record: 1 of 74

To add a new donor

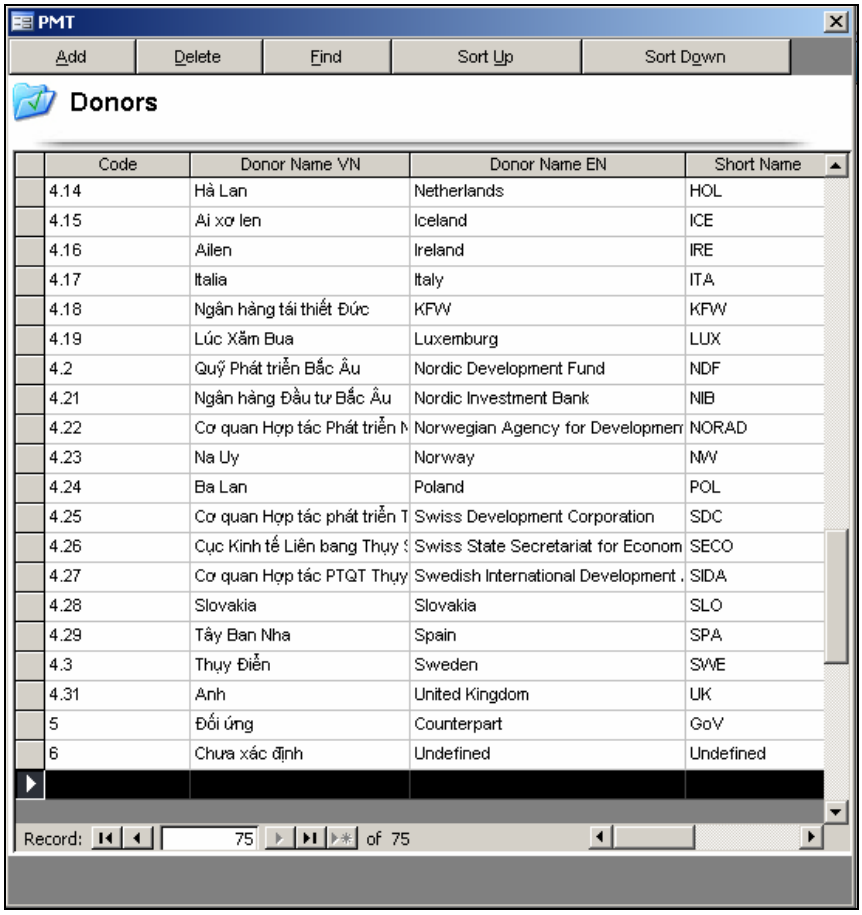
1 Access the window of **Donors** as instructed above

2 Use mouse or click **Add** to move to the blank record at the end of the table

3 Input information of the new Donor such as Code, Donor Name (in English and Vietnamese) and its short name.

4 Select type of donor and country from the available list

5 Click **Enter** to save


PMT
Add
Delete
Find
Sort Up
Sort Down
Donors
Code
Donor Name VN
Donor Name EN
Short Name
4.14 Hà Lan Netherlands HOL
4.15 Ai xơ len Iceland ICE
4.16 Ailen Ireland IRE
4.17 Italia Italy ITA
4.18 Ngân hàng tái thiết Đức KFW KFW
4.19 Lúc Xăm Bua Luxemburg LUX
4.2 Quỹ Phát triển Bắc Âu Nordic Development Fund NDF
4.21 Ngân hàng Đầu tư Bắc Âu Nordic Investment Bank NIB
4.22 Cơ quan Hợp tác Phát triển N Norwegian Agency for Developmen NORAD
4.23 Na Uy Norway NW
4.24 Ba Lan Poland POL
4.25 Cơ quan Hợp tác phát triển T Swiss Development Corporation SDC
4.26 Cục Kinh tế Liên bang Thụy S Swiss State Secretariat for Econom SECO
4.27 Cơ quan Hợp tác PTQT Thụy Swedish International Development . SIDA
4.28 Slovakia Slovakia SLO
4.29 Tây Ban Nha Spain SPA
4.3 Thụy Điển Sweden SWE
4.31 Anh United Kingdom UK
5 Đối ứng Counterpart GoV
6 Chưa xác định Undefined Undefined
Record: 75 of 75

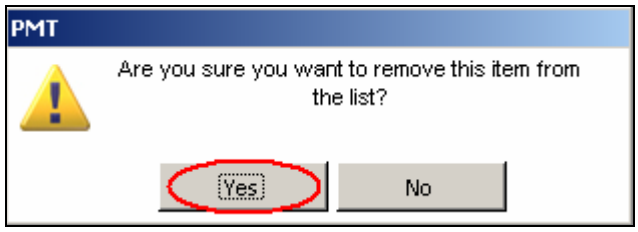
To edit or delete an existing donor

1 Access the window of **Donors** as instructed above

2 Use mouse to move to the record of donor to be Modified or Deleted

3 If you want to edit that donor, you just need to fill in the data fields with the new appropriate information

4 If you want to delete that donor, click **Delete** and say Yes to confirmation question



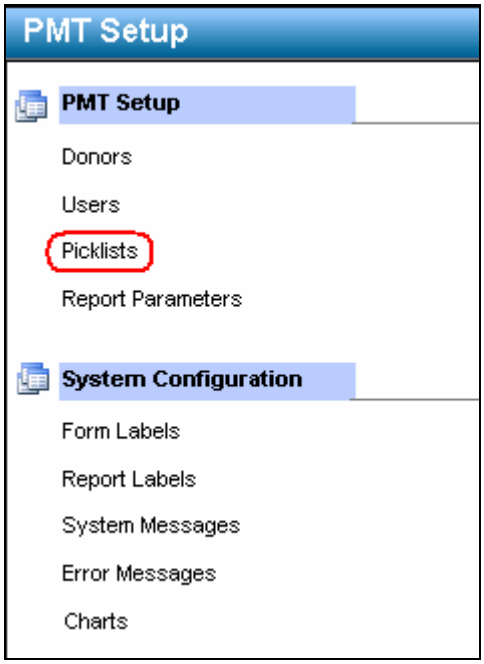
Pick lists

The below list of pick lists is used in PMT:

- AMT Processes and AMT Process Date Types
- Bid Review Method
- Bidder Selection Method
- Bidding Procedure
- Contract Type
- Country
- Currency
- Data Error Types
- Document Types
- Fund Types
- Package Types
- Project Status
- Provinces and Regions
- Sector Level 1 and Sector level 2
- Type of Donor

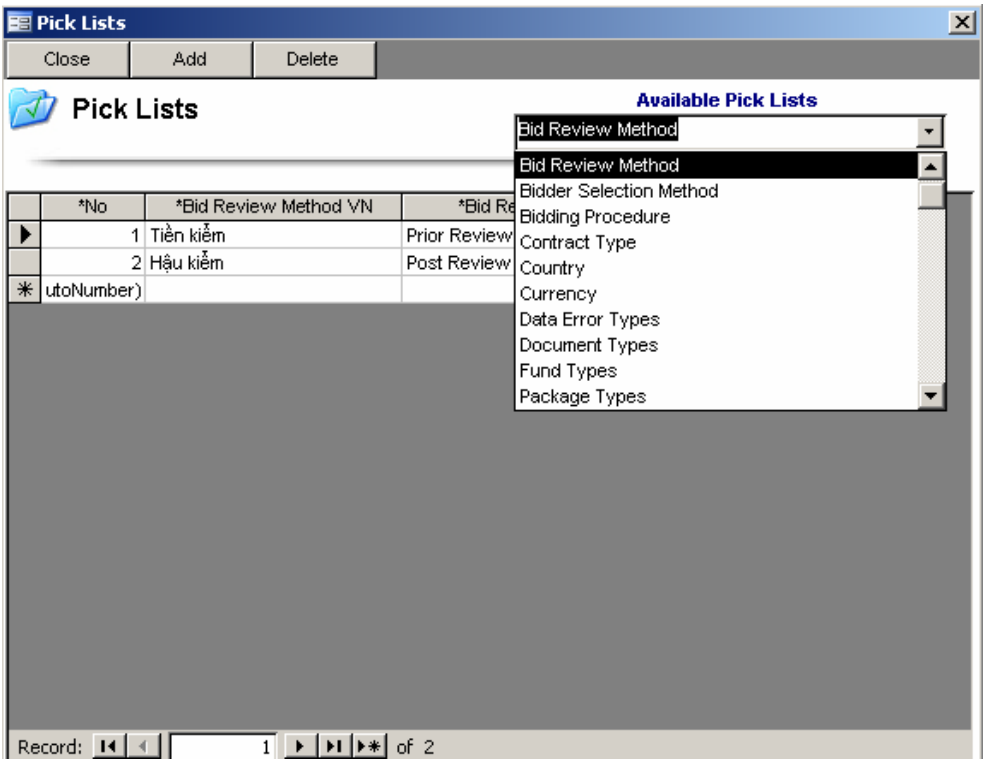
To access pick lists

1 Access the list of content to be set up as instructed above



2 Click the link **Pick lists**

3 The window of Pick lists is displayed



4 Select from in the dropdown list of Available Pick lists to display or edit

To change a pick list

1 Access the window of **Pick lists** as instructed above

2 Select the list to be added or changed from the dropdown list

3 The selected pick list is displayed

4 Use mouse to move to the record to be changed

5 If you want to add a new record, you can click **Add** to move to the blank record at the end of the list

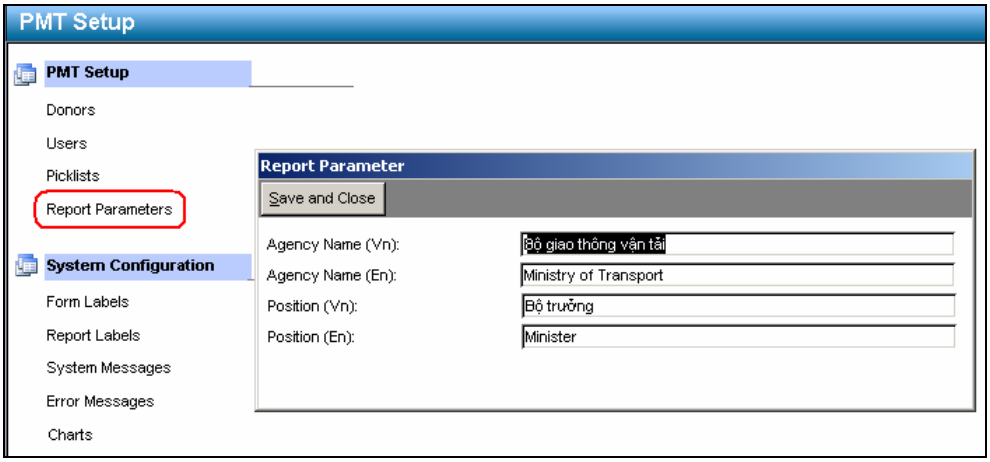
5 Input information into the data fields

6 Click **Close** to save and exit.

Report parameters

1 Access the list of content to be set up as instructed above

2 Click **Report Parameter** in the list to display a new window



3 Change any report parameter if necessary

4 Click **Save and Close** to exit.

Contacts

Mr. Cao Mạnh Cường

Head of General Division
FERD/ MPI
Tel: 0804 3016
Email: cmanhcuong@yahoo.com

Mr. Cao Thanh Phú

Expert, General Division
FERD/ MPI
Tel: 0804 3115
Email: caothanhphu@mpi.gov.vn